2017	1040	US	Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2017, please check the appropriate box and provide additional information if necessary.
For questions that do not apply to you, simply ignore them, or check the "No" box.
If you leave a question blank, we will not ask you about it. Put a "?" or other note if you are unsure.

Yes	No	PERSONAL INFORMATION
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year?
☐	☐	Did you, your spouse, and your dependents have healthcare coverage for the full year?
☐	☐	Are you or any of your dependents **severely** disabled, as defined by the State of Oregon?
☐	☐	Could you be claimed as a dependent on another person's tax return for 2017?
☐	☐	Do you operate a business or own rental property in Portland or Multnomah County?
☐	☐	If you live in the City of Portland, would you like us to prepare your Portland Arts Tax Return? If no, you can quickly file online at www.artstax.net.
		Please check "Yes" next to your preferred method(s) of contact for any questions.
☐	☐	Email:
☐	☐	Phone:
☐	☐	Other:__________________________

Yes	No	DEPENDENTS
☐	☐	Were there any changes in dependents?
☐	☐	Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2017?
☐	☐	At the end of 2017, did any of your dependents have interest and dividend income in excess of $1,050, or total investment income in excess of $2,100?
☐	☐	Did you pay for any child care expenses in 2017?

Yes	No	INCOME
☐	☐	Did you receive any unreported income (cash or otherwise, including tips and kit rentals) that isn't included in the amounts provided by you on the organizer or Forms 1099/W-2?
☐	☐	Did you receive any disability income?
☐	☐	Did you receive any unemployment income?
☐	☐	Did you receive any incentive stock options from your employer?

2017	1040	US	Miscellaneous Questions

Yes	No	BUSINESSES AND RENTALS
☐	☐	Did you start a business or farm?
☐	☐	Did you purchase rental or royalty property?
☐	☐	Did you acquire an interest in a partnership, S corporation, trust or REMIC?
☐	☐	Did you purchase any business assets (furniture, equipment, vehicles, real estate, etc.) with a cost of more than $2,500 per item? Provide copies of invoices for these items.
☐	☐	Did you convert any personal assets to business use?
☐	☐	Did you dispose of any business assets or convert any business assets to personal use?
☐	☐	Was your home rented out in full or in part during 2017?
☐	☐	Was your home used for business during 2017?
☐	☐	If you have a business or are a real estate professional, did you pay more than $600 to any vendor (person or company) for services performed or rent paid in the course of business during 2017?
☐	☐	If you answered yes to the previous question, did you file Forms 1099 for 2017? **If no, contact us immediately; these forms are due January 31st.**
☐	☐	If you own any rental property, did you use any of it personally for one or more days during 2017?

Yes	No	PURCHASES, SALES AND DEBT
☐	☐	Did you sell any stocks, bonds or other investment property in 2017?
☐	☐	Did you have any investments that became totally worthless during 2017?
☐	☐	Did you purchase or sell your principal residence or a second home/rental? Please bring in any related closing (HUD or settlement) statements.
☐	☐	Did you refinance or take out a second or equity loan on a home in 2017? Please bring in any related closing (HUD or settlement) statements.
☐	☐	Did you install any solar, wind, geothermal or fuel cell property in 2017?
☐	☐	Did you have any debts canceled or forgiven?
☐	☐	Did anyone owe you money which has become uncollectible?

Yes	No	RETIREMENT PLANS
☐	☐	Did you receive a distribution from a retirement plan (401(k), IRA, Roth IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Miscellaneous Questions (Continued)

2017	1040	US	Miscellaneous Questions

☐ ☐ If you received a distribution from a traditional IRA, have you ever made a non-deductible contribution to your IRA?

☐ ☐ Did you make a contribution to a retirement plan (401(k), IRA, Roth IRA, SEP, SIMPLE, Qualified Plan, etc.) **other than through payroll at work as shown on your Form W-2**? Amount contributed $ ________

☐ ☐ Do you want to consider additional contributions to any retirement plans (IRA, Roth, SEP, SIMPLE, 401(k)), if allowed?

☐ ☐ Did you transfer or rollover any amount from one retirement plan to another?

☐ ☐ Did you convert part or all of any retirement account to a Roth IRA account?

Yes No EDUCATION

☐ ☐ Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program (529 plans)?

☐ ☐ Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

☐ ☐ Did you incur any expenses working as a teacher, counselor, or principal for grades kindergarten through grade 12? Amount of expense $ _______

☐ ☐ Did you contribute to your state's college savings plan? Amount $ _______

Yes No ITEMIZED DEDUCTIONS

☐ ☐ If you do not live or work full time in Oregon, did you pay **sales tax** on the purchase of any motor vehicles, boats, home improvement or other high cost item in 2017? If yes, please bring in any related documentation.

☐ ☐ Did you incur a loss greater than 10% of your income due to damaged or stolen property?

☐ ☐ Did you work out of town for part of the year?

☐ ☐ Did you use your car on the job (other than to and from work) that was not reimbursed by your employer at a rate of 53.5 cents per mile?

☐ ☐ Did you owe any unpaid taxes from 2016 or prior years (including federal, state, and local taxes) that were not paid in full by December 31, 2017?

Yes No ESTIMATED TAXES

☐ ☐ If you have an overpayment of taxes, do you want the excess applied to 2018 estimated tax (instead of being refunded) if you owe estimated tax for 2018?

☐ ☐ Do you expect next year's **(2018)** income and withholdings to be **significantly** different from 2017?

Miscellaneous Questions (Continued)

2017	1040	US	Miscellaneous Questions

Yes	No	MISCELLANEOUS
☐	☐	Did you purchase health insurance through a state or federal marketplace/exchange? If yes, bring in Form 1095-A (Health Insurance Marketplace Statement).
☐	☐	Did you receive an Identity Protection PIN (IPPIN) from the IRS? If yes, please bring in a copy of the notice with the PIN on it.
☐	☐	If you have a refund, would you like it directly deposited to your bank account? **If yes, provide your account information, or X here if same as last year: __**
☐	☐	If you owe money, would you like the balance due directly withdrawn from your checking or savings account?
☐	☐	Do you or your spouse want to allocate $3 to the Presidential Election Fund?
☐	☐	Did you have any foreign income or pay any foreign taxes?
☐	☐	Did you have any interest (including signature authority) in any foreign assets, accounts or trusts (including transfers to or from foreign trusts) at any point during 2017?
☐	☐	Did you receive any gifts or inheritances from foreign sources during 2017?
☐	☐	Did you establish, make contributions or receive distributions from a Health Savings Account (HSA) this year?
☐	☐	Did you receive payments under a long-term care insurance contract (LTC) or did you receive any accelerated death benefits from a life insurance policy?
☐	☐	Did you incur any adoption expenses or adopt a special needs child?
☐	☐	Did you incur moving expenses related to a change of employment?
☐	☐	Did you engage the services of any household/child care employees (not through a cleaning, daycare or home health care service)?
☐	☐	Were you notified or audited by the IRS or a state or local taxing agency and have not previously brought it to our attention?
☐	☐	Did you or your spouse make any gifts to an individual that total more than $14,000 (including cash, stocks, property, etc.), or contributions of any amount to a trust?
☐	☐	If you file an Oregon return, did you make any political contributions in 2017 to candidates, a political party or a PAC? Amount contributed $ ________
☐	☐	Would you prefer to have your organizer emailed to you in place of a paper organizer next year? **If yes, please verify or provide your email address.**
☐	☐	Would you like a copy of your tax return emailed to you? **Please note: this is just a copy for your records; it does not replace the need to pick up your return or have it mailed to you.**

2017	1040	US	Miscellaneous Questions

CHECKLIST

The following is a list of common items needed for your tax return preparation. Please review and provide the following, as applicable. **This list is not all-inclusive; provide any other documentation that may apply.**

Form(s) W-2 (wages, etc.)

Form(s) 1099 (interest, dividends, nonemployee compensation, etc.)

Form(s) 1099-R, K & G (retirement distributions, third-party payments, unemployment compensation)

Form(s) 1095-A/B/C (health care coverage statements) **- We must have any Forms 1095 you have received.**

Brokerage statements from stock, bond, or other investment transactions

Schedule(s) K-1 (income/loss from partnerships, S-corporations, trusts, etc.)

Form(s) 1098 (mortgage interest) and property tax statements

Settlement statements pertaining to real estate purchase, sale, and financing/refinancing transactions

Any notices from the IRS and other taxing authorities received during the year

Written acknowledgment from charities for any total donations of $250 or more

Receipts/invoices for any business capital asset purchases

Form(s) 1099 filed by you for payments made from your business

Deposits received and paid out for rental properties

OTHER REMINDERS

Remember to review your beneficiary elections for all retirement accounts (IRAs, 401(k)s, etc.) annually.

Your IRAs should not be investing in any publicly traded partnerships. If you are receiving any K-1s indicating they are owned by your IRA, please bring this to our attention.

If you are over age 70 1/2 and have any retirement accounts, you are required to make minimum distributions from these accounts every year (with limited exceptions). If you are not doing this, or have any questions related to this, please let us know. You are also allowed to send your RMDs directly to charities, which may be a better option in many cases.

If your business operates (including making deliveries) in a state that has sales tax, you may be required to file sales tax reports in that state. Please let us know if you have questions about this.

It is important to discuss any large gifts you are considering giving to others, or you may receive before actually transferring the property. If you are considering gifting anything, or someone is considering giving you a large gift, please contact us.

If you claim business expenses against your employee income (freelance or full time, on Form W-2), you should get a copy of every employer's expense reimbursement policy. If you do not have one now, ask your employer for it. For all new employers, ask for this on the first day of your new job.