

2021

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US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2021, please check the appropriate box, and provide additional information as 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 |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you or any of your dependents severely disabled, as defined by the State of Oregon? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2021? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you operate a business or own rental property in Portland or Multnomah County? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 . If the new Multnomah County or Metro taxes apply to you, we will automatically include them with your returns. |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you object to us contacting you by email with any questions? In most cases, we prefer to send questions to you in writing for your review before discussing them over the phone, if necessary. |

- | Yes | No | DEPENDENTS |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | During 2021, did any of your dependents have interest and dividend income in excess of \$1,100, or total investment income in excess of \$2,200? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay for any child care expenses in 2021? |

- | Yes | No | INCOME |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 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? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any unemployment income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any stock options from your employer? |

- | Yes | No | BUSINESSES AND RENTALS |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business or farm? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase rental or royalty property? |

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Yes

No

Did you acquire an interest in a partnership, S corporation, trust or REMIC?

Did you convert any personal assets to business use?

Did you dispose of any business assets or convert any business assets to personal use?

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

Did you use your car for business (other than to and from work)?

Was your home rented out in full or in part during 2021?

Was your home used for business during 2021?

If you have a business or own rental properties, did you pay more than \$600 to any vendor (person or company) for services or rent during 2021?

If you answered yes to the previous question, did you file Forms 1099 for 2021? **If no, contact us immediately to determine if they are required, as they are due January 31st.**

If you own any rental property, did you use any of it personally for one or more days during 2021?

Did you obtain a PPP loan, or other economic assistance during 2021?

Were you unable to work for any period during 2021 due to any COVID-related reason?

Yes

No

PURCHASES, SALES AND DEBT

Did you own virtual currency or NFTs at any point during 2021?

Did you sell any stocks, bonds or other investment property in 2021?

Did you have any investments that became totally worthless during 2021?

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 2021? Please bring in any related closing (HUD or settlement) statements.

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell property?

Did you purchase an electric (plug-in) vehicle in 2021?

Did you have any debts canceled or forgiven?

Did anyone owe you money which has become uncollectible?

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- | Yes | No | |
|----------------------------|--------------------------|---|
| RETIREMENT PLANS | | |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a retirement plan (401(k), IRA, Roth IRA, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you received a distribution from a traditional IRA, have you ever made a non-deductible contribution to your IRA? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 ? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to consider additional contributions to any retirement plans (IRA, Roth, SEP, SIMPLE, 401(k)), if allowed? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or rollover any amount from one retirement plan to another, or return any distributions to your account? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of any retirement account to a Roth IRA account? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any contributions to charity directly out of an IRA account? |
| EDUCATION | | |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program (529 plans)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any expenses working as a teacher, counselor, or principal for kindergarten through grade 12? Amount of expense \$ _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you contribute to your state's college savings plan? Amount \$ _____ |
| ITEMIZED DEDUCTIONS | | |
| <input type="checkbox"/> | <input type="checkbox"/> | If you do not live or work full time in Oregon, did you pay sales tax on the purchase of any vehicles, home improvements, or other high cost item in 2021? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you owe any unpaid taxes from 2020 or prior years (including federal, state, and local taxes) that were not paid in full by December 31, 2021? |
| ESTIMATED TAXES | | |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have an overpayment of taxes, do you want the excess applied to 2022 estimated tax (instead of being refunded) if you owe estimated tax for 2022? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you expect next year's (2022) income and withholdings to be significantly different from 2021? |

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Yes	No	MISCELLANEOUS
<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase health insurance through a state or federal marketplace/exchange?
<input type="checkbox"/>	<input type="checkbox"/>	If you purchased health insurance in 2021 other than through your employer , did you have access to an employer health insurance plan at any point during 2021?
<input type="checkbox"/>	<input type="checkbox"/>	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.
<input type="checkbox"/>	<input type="checkbox"/>	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: ___
<input type="checkbox"/>	<input type="checkbox"/>	If you owe money, would you like the balance due directly withdrawn from your checking or savings account?
<input type="checkbox"/>	<input type="checkbox"/>	Do you or your spouse want to allocate \$3 to the Presidential Election Fund?
<input type="checkbox"/>	<input type="checkbox"/>	Did you have any foreign income or pay any foreign taxes?
<input type="checkbox"/>	<input type="checkbox"/>	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 2021?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any gifts or inheritances from foreign sources during 2021?
<input type="checkbox"/>	<input type="checkbox"/>	Do you have HSA-eligible (high-deductible) health insurance?
<input type="checkbox"/>	<input type="checkbox"/>	Did you incur any adoption expenses or adopt a special needs child?
<input type="checkbox"/>	<input type="checkbox"/>	Did you engage the services of any household/child care employees (not through a cleaning, daycare or home health care service)?
<input type="checkbox"/>	<input type="checkbox"/>	Were you notified or audited by the IRS or a state or local taxing agency and have not previously brought it to our attention?
<input type="checkbox"/>	<input type="checkbox"/>	Did you or your spouse make any gifts to an individual that total more than \$15,000 (including cash, stocks, property, etc.), or transfers of any amount to a trust?
<input type="checkbox"/>	<input type="checkbox"/>	If you file an Oregon return, did you make any political contributions in 2021 to candidates, a political party or a PAC? Amount contributed \$ _____
<input type="checkbox"/>	<input type="checkbox"/>	Did you put money in or withdraw money from an Individual Development Account (IDA) for 2021?
<input type="checkbox"/>	<input type="checkbox"/>	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.
<input type="checkbox"/>	<input type="checkbox"/>	Would you like a copy of your tax return made available to you on our online portal?

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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 complete; provide any other documentation that may apply.**

Economic Impact Payment (stimulus) letter (Notice 1444), or the amount received in spring 2021

Advanced Child Tax Credit Payments Letter 6419, if you received prepayments during 2021

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

Form(s) 1099, including:

- Form 1099-INT (interest) and Form 1099-DIV (dividends)
- Consolidated Forms 1099 (brokerage statements - include **all** pages, including detail)
- Form 1099-NEC (nonemployee compensation) and Form 1099-MISC (miscellaneous payments)
- Form 1099-R (retirement distributions)
- Form 1099-K (third-party/credit card processor payments)
- Form 1099-G (government payments, including refunds and unemployment benefits)

Form(s) 1095-A (Health Insurance Marketplace Statement)

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

If you own rental property and have a property manager, include the manager's year-end statement. Do not enter these amounts on the organizer, include only the amounts paid outside the management company.

Tenant deposits received and paid out for rental properties

If you have a business, and use bookkeeping software, do not enter these amounts on the organizer. Instead, provide an Accountant's Copy or backup of any QuickBooks files, or contact us for the correct reports to print from your program.

Receipts/invoices for any business capital asset purchases over \$2,500 each

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

Written acknowledgment/receipts from charities for any charitable donations, even if you do not itemize

OTHER REMINDERS

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

If you are over age 72 and have any retirement accounts, you are required to make minimum distributions from these accounts every year (with limited exceptions). You are also allowed to send your RMDs directly to charities, which may be a better option in many cases.

If your business sells to customers 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.