ORGANIZER

2022 | 1040 | US | Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2022, 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
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the 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 2022?
☐	☐	Do you operate a business or own rental property in Portland or Multnomah County?
☐	☐	If you live in Portland, would you like us to prepare your Arts Tax Return?
☐	☐	Do you **object** to us contacting you by email? In most cases, we prefer to send questions to you in writing for your review before discussing them, if necessary.

Yes	No	DEPENDENTS
☐	☐	Were there any changes in dependents?
☐	☐	During 2022, did any of your dependents have income in excess of $1,150?
☐	☐	Did **all** of your dependents live with you during **more than** half of 2022?
☐	☐	Did you pay for any child care expenses in 2022?

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 stock options from your employer?
☐	☐	Did you have any foreign income or pay any foreign taxes?

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?

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Yes	No	
☐	☐	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 2022?
☐	☐	Was your home used for business during 2022?
☐	☐	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 2022?
☐	☐	If you answered yes to the previous question, did you file Forms 1099 for 2022? **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 2022?
Yes	**No**	**PURCHASES, SALES AND DEBT**
☐	☐	Did you own virtual currency or NFTs at any point during 2022?
☐	☐	Did you sell or trade any stocks, bonds or other investment property in 2022?
☐	☐	Did you have any investments that became totally worthless during 2022?
☐	☐	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 2022? Please bring in any related closing (HUD or settlement) statements.
☐	☐	Did you make any residential energy-efficient improvements or purchases in 2022?
☐	☐	Did you purchase an electric (plug-in or plug-in hybrid) vehicle in 2022?
☐	☐	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, etc.)?
☐	☐	If you received a distribution from a traditional IRA, have you ever made a non-deductible contribution to your IRA?

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Yes	No	
☐	☐	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**?
☐	☐	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, or return any distributions to your account?
☐	☐	Did you convert part or all of any retirement account to a Roth IRA?
☐	☐	If you are age 70 1/2 or older, did you make any contributions to charity directly out of an IRA?

Yes	No	EDUCATION
☐	☐	Did you pay interest on any student loans in 2022?
☐	☐	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 kindergarten through grade 12? Amount of expense $ _______ (maximum $300)
☐	☐	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 vehicles, home improvements, or other high-cost item in 2022?
☐	☐	Did you owe any unpaid taxes from 2021 or prior years (including federal, state, and local taxes) that were not paid in full by December 31, 2022?
☐	☐	Did you give any money to charity in 2022?
☐	☐	Did you give any goods to charity in 2022?

Yes	No	ESTIMATED TAXES
☐	☐	If you have an overpayment of taxes, do you want the excess applied to 2023 estimated tax (instead of being refunded) if you owe estimated tax for 2023?
☐	☐	Do you expect next year's **(2023)** income and withholdings to be **significantly** different from 2022?

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Yes	No	MISCELLANEOUS
☐	☐	Did you purchase health insurance through a state or federal marketplace/exchange?
☐	☐	If you purchased health insurance in 2022 **other than through your employer**, did you have access to an employer health insurance plan at any point during 2022?
☐	☐	Did you receive an Identity Protection PIN (IPPIN) from the IRS? If yes, provide 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 interest (including signature authority) in any foreign assets, accounts or trusts (including transfers to or from foreign trusts) at any point during 2022?
☐	☐	Did you receive any gifts or inheritances from foreign sources during 2022?
☐	☐	Did you have HSA-eligible (high-deductible) health insurance at any point during 2022?
☐	☐	Did you incur any adoption expenses or adopt a special needs child?
☐	☐	Did you engage the services of any household or 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 totaling more than $16,000 (including cash, stocks, property, etc.), or transfers of any amount to a trust?
☐	☐	If you file an Oregon return, did you make any political contributions in 2022 to candidates, a political party or a PAC? Amount contributed $ ________
☐	☐	Did you put money in or withdraw money from an Individual Development Account (IDA) for 2022?
☐	☐	Would you prefer a digital organizer in place of a paper organizer next year?
☐	☐	Would you like a copy of your tax return made available to you on our online portal?
☐	☐	If you said yes to the prior question, would you also like a paper copy of your completed return?

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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.**

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 1099-Q (payments from qualified education programs)

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

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

Form(s) 1098-T (tuition statement)

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). If over 70 1/2, 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.