

<b>2023</b>	<b>1040</b>	<b>US</b>	<b>Miscellaneous Questions</b>
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If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide additional information if necessary.

Yes	No	<b>PERSONAL INFORMATION</b>
<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"/>	Could you be claimed as a dependent on another person's tax return for 2023?
<input type="checkbox"/>	<input type="checkbox"/>	Did your bank account information change within the last twelve months? If so, please provide name of bank _____ Routing # _____ Account# _____ Select: Checking ____ or Savings ____
<input type="checkbox"/>	<input type="checkbox"/>	Would you like your refunds direct deposited to the above account?
<input type="checkbox"/>	<input type="checkbox"/>	Would you like your balance due direct debited from the above account?
<input type="checkbox"/>	<input type="checkbox"/>	If your tax return cannot be completed on time, can we file an extension for you?
<b>DEPENDENTS</b>		
<input type="checkbox"/>	<input type="checkbox"/>	Did you remove or add any dependents?
<input type="checkbox"/>	<input type="checkbox"/>	Did any of your unmarried children who could be claimed as dependents, turn age 19 years or older at the end of 2023?
<input type="checkbox"/>	<input type="checkbox"/>	Did you have any children under age 19 or full-time students under age 24 at the end of 2023, with interest and dividend income in excess of \$1,250, or total investment income in excess of \$2,500?
<input type="checkbox"/>	<input type="checkbox"/>	Are you claiming a dependent that is not living with you?
<b>INCOME</b>		
<input type="checkbox"/>	<input type="checkbox"/>	Did you change jobs in 2023?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive unemployment compensation in 2023? If so, please include form 1099-G.
<input type="checkbox"/>	<input type="checkbox"/>	Did you cash any Series EE U.S. savings bonds <u>and</u> pay qualified higher education expenses for yourself, your spouse, or your dependents?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive form 1099-K? If so, provide the form and the cost of any items sold.
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any foreign income or pay any foreign taxes?

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Yes No **BUSINESSES, RENTALS AND FARMS**

- Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- Was your home rented out or used for business?
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
- Did your business have sales for clients or customers that reside or work in the City of Portland or Multnomah County and your business is located outside of these tax jurisdictions?

**PURCHASES, SALES AND DEBT**

- Did you buy or sell any stocks, bonds or other investment property in 2023?
- Did you purchase, sell, or refinance your primary, secondary, or rental home? If so, please provide the closing statements.
- Did you take cash out of your home equity loan or refinance and use the funds for anything other than to build, remodel or repair the home?
- Did you purchase any electric or hybrid vehicles in 2023? If so, please provide your purchase receipts and VIN.
- Did you make any Residential Clean Energy purchases involving solar, wind, geothermal, fuel cell energy sources, or battery storage? If so, please provide the purchase and installation invoices.
- Did you make any Residential Energy Efficient Home Improvement purchases involving windows, doors, skylights, hvac, water heaters, heat pumps, biomass stoves, or boilers? If so, please provide the purchase and installation invoices.
- Did you have any debts canceled or forgiven?
- At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? If so, please provide documentation of purchase and sales.

**FOREIGN ACCOUNTS**

- Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
- Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?

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			<p><b>RETIREMENT</b> Please provide all 1099-R forms.</p>
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
<input type="checkbox"/>	<input type="checkbox"/>		Did you make any distributions directly from your retirement account to a qualifying 501(c)(3) charity (QCD)?
<input type="checkbox"/>	<input type="checkbox"/>		Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
<input type="checkbox"/>	<input type="checkbox"/>		Did you transfer or rollover any amount from one retirement plan to another retirement plan?
<input type="checkbox"/>	<input type="checkbox"/>		Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2023?
			<b>MISCELLANEOUS</b>
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive health care insurance from the Health Insurance Marketplace and receive <b>Form 1095-A</b> ? If so, please provide the <b>1095-A</b> form. Forms 1095-B and 1095-C are not required for your tax return.
<input type="checkbox"/>	<input type="checkbox"/>		Do you want to allocate \$3 to the Presidential Election Campaign Fund?
<input type="checkbox"/>	<input type="checkbox"/>		Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
<input type="checkbox"/>	<input type="checkbox"/>		May the IRS discuss your tax return with your preparer?
<input type="checkbox"/>	<input type="checkbox"/>		Did you or your spouse receive a six-digit Identity Protection Pin issued from the IRS? If so, please include IRS letter.
<input type="checkbox"/>	<input type="checkbox"/>		Do you take part in an income-based student loan repayment program?
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive any notices or letters in 2023 from either the IRS or a State taxing agency? If so, please provide the notice(s) if you have not already provided them to us.
<input type="checkbox"/>	<input type="checkbox"/>		Would you like assistance in setting up your IRS and State's online tax accounts? Having an online account gives you quick access to your tax records.
<input type="checkbox"/>	<input type="checkbox"/>		Did you engage the services of any household employees?
<input type="checkbox"/>	<input type="checkbox"/>		Did you or your spouse make any gifts to an individual that total more than \$17,000, or make any gifts to a trust?
<input type="checkbox"/>	<input type="checkbox"/>		Are you a member of the US Armed Forces on active duty who moved pursuant to a military order related to a permanent change of station?

Yes No EDUCATION

Please provide 1098-T forms and cost of books and fees outside of tuition.

Did you have any **distributions** from an Education Savings Account or a Qualified Tuition Program, such as a 529 plan? If so, please provide form 1099-Q.

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

**OREGON**

Did you make a **contribution** to an Oregon 529 plan? If so, how much for taxpayer \_\_\_\_\_ and spouse \_\_\_\_\_?

Did you make a political contribution for a federal, state, or local elective office, a candidate's campaign for an election in Oregon, or a political action committee certified in Oregon? If so, how much for taxpayer \_\_\_\_\_ and spouse \_\_\_\_\_?

Did you contribute to the Oregon Cultural Trust? If so, how much for taxpayer \_\_\_\_\_ and spouse \_\_\_\_\_?

Use this space to write any additional information you want to convey.

Multiple horizontal lines for writing additional information.