

If any of the following items pertain to you or your spouse for 2012, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes No

Did your marital status change during the year?

Did your address change during the year?

Could you be claimed as a dependent on another person's tax return for 2012?

Are you or any of your dependents considered **severely** disabled as defined by the State of Oregon?

Do you live in, operate a business in, or own rental property in the City of Portland or Multnomah County?

Do you, your spouse and dependents have health insurance coverage, or will you by January 1, 2014?

DEPENDENTS

Yes No

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 2012?

At the end of 2012, did you have any children under age 19, or full-time students under age 24, with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900?

INCOME

Yes No

Did you receive any unreported income (cash or otherwise, including tips) that is not included in the amounts provided by you on the organizer?

Did you cash any **Series EE** US savings bonds issued after 1989 and pay higher education expenses for yourself, your spouse, or your dependents?

Did you receive any disability income?

Did you have any foreign income or pay any foreign taxes?

Did you receive any unemployment income?

Did you receive any incentive stock options from your employer?

BUSINESSES AND RENTALS

Yes No

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<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?
<input type="checkbox"/>	<input type="checkbox"/>		Did you acquire an interest in a partnership, S corporation, trust or REMIC?
<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
<input type="checkbox"/>	<input type="checkbox"/>		Did you dispose of any business assets or convert any assets to personal use?
<input type="checkbox"/>	<input type="checkbox"/>		Was your home rented out in full or in part during 2012?
<input type="checkbox"/>	<input type="checkbox"/>		Was your home used for business during 2012?
<input type="checkbox"/>	<input type="checkbox"/>		If you have a business, did you pay more than \$600 to any vendor (person or company) for services performed in the course of business during 2012?
<input type="checkbox"/>	<input type="checkbox"/>		If you answered yes to the previous question, did you file Forms 1099 for 2012?
<input type="checkbox"/>	<input type="checkbox"/>		If you own any rental property, did you use any of it personally for one or more days during 2012?
<input type="checkbox"/>	<input type="checkbox"/>		If you are self-employed and are required to have a special license to operate your business, was it expired or otherwise not in effect at any time during 2012?
			PURCHASES, SALES AND DEBT
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		Did you sell any stocks, bonds or other investment property in 2012?
<input type="checkbox"/>	<input type="checkbox"/>		Did you have any investments that became totally worthless during 2012?
<input type="checkbox"/>	<input type="checkbox"/>		Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2012?
<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase or sell your principal residence or second home? Please bring in any related closing (HUD or settlement) statements.
<input type="checkbox"/>	<input type="checkbox"/>		Have you claimed a Federal home purchase tax credit since 2007?
<input type="checkbox"/>	<input type="checkbox"/>		Did you refinance or take out a second or equity loan on your home in 2012? Please bring in any related closing (HUD or settlement) statements.
<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal or fuel cell property or improvements in 2012?
<input type="checkbox"/>	<input type="checkbox"/>		Did you have any debts cancelled or forgiven?
<input type="checkbox"/>	<input type="checkbox"/>		Did anyone owe you money which has become uncollectible?
			RETIREMENT PLANS
Yes	No		

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Miscellaneous Questions

Did you receive a distribution from a retirement plan (401(k), IRA, Roth IRA, SEP, SIMPLE, Qualified Plan, etc.)?

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 \$ _____

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 account?

EDUCATION

Yes No

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

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 \$ _____

ITEMIZED DEDUCTIONS

Yes No

If you or your spouse were 62 or older as of 12/31/2012 and lived or worked in Oregon, did you have any medical expenses (prescriptions, co-pays, insurance payments, vehicle mileage, etc.), regardless of amount? If yes, please list any medical expenses on the itemized deduction page of the organizer.

Did you pay **sales tax** on the purchase of any motor vehicles, boats or other high cost item in 2012? If yes, please bring in any related documentation.

Did you incur a loss because of damaged or stolen property? Please note, each loss must be over 10% of your gross income to qualify.

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 55.5 cents per mile?

ESTIMATED TAXES

Yes No

If you have an overpayment of taxes, do you want the excess applied to 2013 estimated tax (instead of being refunded) if you owe estimated tax for 2013?

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Miscellaneous Questions

Do you expect next year's (2013) income and withholdings to be **significantly** different from 2012?

MISCELLANEOUS

Yes No

Do you **object** to allowing your preparer to discuss your return with the IRS or state regarding processing issues? This does not pertain to notices or audits.

If you have a refund, would you like your refund directly deposited to your bank account? If yes, please **verify or provide** your account information.

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 an interest in or other authority over a financial account in a foreign country, such as a bank, securities, or other financial account?

Did you have any interest (including signature authority) in any foreign assets, accounts or trusts (including transfers to or from trusts) at any point during 2012?

Did you receive any gifts or inheritances from foreign sources during 2012?

Did you establish, make contributions or receive distributions from a Health Savings Account (HSA) this year?

Were you a policyholder who received 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 employees?

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 \$13,000 (including cash, stocks, property, etc.), or **any** gifts to a trust?

If you file an Oregon return, did you make any political contributions in 2012 to candidates, a political party or a PAC? Amount contributed \$ _____

If you file an Oregon return, do you pay for long-term care insurance?

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.**