

TAXSTAR

5-Minute Tax Questionnaire

Itemized Deductions Supplemental Questionnaire

INSTRUCTIONS: In order to find every deduction, credit and tax benefit you are entitled to, please answer the following questions regarding your income, reimbursements, deductions expenses, etc.

1	Did you itemize your deductions last year <input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$		
2	Medical & Dental Expenses	Doctors \$	Hospitals \$
3	Prescriptions \$	Eyeglasses \$	Medical insurance premiums \$
4	Nursing services \$	Medical equipment/ modifications \$	
5	Lead-based paint removal \$	Mileage to doctors & pharmacy \$	
6	Taxes	State/ local income \$	Real estate \$ Personal property \$
7	Other \$		
8	Interest	Home mortgage (on Form 1098) \$	Home mortgage (not on Form 1098) \$
9	Points (not on Form 1098) \$	Investment interest \$	
10	Gifts	Cash /checks \$	Other than cash/ checks \$ Carryover from prior year \$
11	Casualty or Theft Loss	Amount \$	
12	Job Expenses	Travel \$	Job seeking \$ Union dues \$
13	Entertainment \$	Meals \$	Lodging \$
14	Gifts \$	Transportation: Car expenses \$	Other \$
15	Education \$	Office in home \$	Trade publications \$
16	Did your employer reimburse you for any business expenses? <input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$		
17	Did you file a Form 2106, Employee Business Expenses, last year ? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Use the following questions as a guide to discovering overlooked expenses and deductions			
18	Tax preparation fees \$	19	Safe deposit box \$
20	Conventions \$	21	Job tools \$
22	Union expenses \$	23	Expenses to produce income \$
24	Hobby expenses (limited) \$	25	Legal expenses (to produce income) \$
26	Home computer (business use) \$	27	Telephone (business use) \$
28	Occupational taxes \$	29	License & regulatory fees \$
30	Other \$	31	Other \$