

**Itemized Deduction Questionnaire: Tax Year \_\_\_\_\_ Advisor Tax Services**

Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

**Write in amounts for all expenses that you have incurred: (also send or bring proof or receipts to your appointment – call or email if you have questions)**

- \_\_\_\_\_ Health/dental/vision insurance premiums
- \_\_\_\_\_ Long term care insurance premiums
- \_\_\_\_\_ Medical expenses (unreimbursed by insurance)  
(doctor, hospital, lab, drug, dentist, eye care, medical devices, etc.)
- \_\_\_\_\_ paid medical costs for someone other than self, spouse or children
- \_\_\_\_\_ Nursing home expenses for spouse, dependent, relative
- \_\_\_\_\_ Medical mileage / lodging
- \_\_\_\_\_ State taxes paid (balance due from prior year)
- \_\_\_\_\_ Real estate taxes (primary home)
- \_\_\_\_\_ Real estate taxes (other property)
- \_\_\_\_\_ Real estate taxes (at closing)
- \_\_\_\_\_ Personal property tax (i.e. auto in another state)
- \_\_\_\_\_ Mortgage interest (form 1098)
- \_\_\_\_\_ Home equity loan interest (form 1098)
- \_\_\_\_\_ Seller financed mortgage interest that you paid (provide amortization schedule)

To: \_\_\_\_\_ Address: \_\_\_\_\_ SS#: \_\_\_\_\_

- \_\_\_\_\_ Points Purchase or refinance? P\_\_\_\_ R\_\_\_\_
- \_\_\_\_\_ Investment/margin interest (form 1099 from broker)
- \_\_\_\_\_ Cash contributions (not political) (requires copy of check, bank statement or receipt)
- \_\_\_\_\_ Property contributions (clothes, furniture, etc. - provide donee name, address, receipt)
- \_\_\_\_\_ Volunteer expenses
- \_\_\_\_\_ Volunteer mileage
- \_\_\_\_\_ Foster care expenses (un-reimbursed)
- \_\_\_\_\_ Casualty or theft losses (not paid for by insurance)
- \_\_\_\_\_ Tax preparation/advice
- \_\_\_\_\_ Financial planning fees
- \_\_\_\_\_ Legal fees related to taxes/investments
- \_\_\_\_\_ Investment expenses
- \_\_\_\_\_ Safe deposit box
- \_\_\_\_\_ Repaid unemployment
- \_\_\_\_\_ Gambling losses

**Expenses you incurred as an employee:**

- \_\_\_\_\_ Professional and union dues \_\_\_\_\_ Job-hunting expenses (same field)
- \_\_\_\_\_ Professional licenses and fees \_\_\_\_\_ Job related education expenses
- \_\_\_\_\_ Professional subscriptions and pubs
- \_\_\_\_\_ Meals and lodging while away from home overnight (for temp. jobs less than 1 year)
- \_\_\_\_\_ Other un-reimbursed employee expenses

(uniforms, laundry, small tools, safety gear, supplies, liability insurance, telephone, convention expenses incl. travel, personal vehicle mileage)