

TAX QUESTIONNAIRE CHECKLIST

- ☐ Did you use your car on the job, for business or investments? If so, how many miles?

- ☐ Are you making loan payments on a recreational vehicle or boat that has basic living accommodations?
- ☐ Did you work out of town for part of the year?
- ☐ Did you have a second job? If so, how many miles from first job to second job? _____
- ☐ Are you required by your employer to have a telephone?
- ☐ Did you incur any legal or financial planning expenses?
- ☐ Did you travel between more than one job location during any workday, or travel from you home to any temporary work location?
- ☐ Did you donate old clothing, furniture, or other non-cash items to Goodwill, Salvation Army, etc.? (If yes, bring approximate cost and value of those items, and the names and addresses of those organizations.)
- ☐ Are you required to have any special licenses, permits, or certificates for your job?
- ☐ Did you purchase any special clothing, tools, or equipment required for you job?
- ☐ Did you purchase a computer or equipment that helps in your job, business, or school?
- ☐ Did you subscribe to, or purchase trade journals, books, publications, or other materials related to your job?
- ☐ Did you pay any fees or incur other expenses in order to obtain employment?
- ☐ Did you look for other employment? (Even if you didn't change jobs)
- ☐ What are your job seeking expenses, if any? _____
- ☐ Do you belong to any professional society or organization, such as a management club, engineering society, etc.?
- ☐ Do you have a hobby that may become a business?
- ☐ Do you have a business of your own, or would you like to start one?
- ☐ Did you (or do you want to) contribute to an IRA, Roth IRA, SEP, Keogh or SIMPLE plan for the tax year, or in the future?
- ☐ Do you own any stocks, bonds, or investments or hold any bad debts that became worthless during the year?
- ☐ Did you incur any educational expenses on behalf of yourself, spouse or a dependent? If yes, how much _____, and what type (e.g. college, trade, private school, etc.) _____
- ☐ Did you pay any education loan interest during the tax year? Amount \$ _____
- ☐ Are you a teacher? If yes, a special deduction of up to \$250 is allowed for classroom expenses of teachers. The deduction can be claimed even if the standard deduction is claimed.