

Client Intake Questionnaire

Schedule A – Itemized Deductions

A. Medical Expenses. Did you (or your spouse or dependent) incur any of the following *unreimbursed* medical-related expenses? If so, how much did you spend in each of the following categories? Note that expenses paid from a Medical Savings Account (MSA) are not deductible:

- Prescription Drugs..... _____
- Doctors and Dentist Bills..... _____
- Nursing Care..... _____
- Medical or Hospital Insurance Premiums (including Long-Term Care Premiums)..... _____
- Prescription Eyeglasses, Hearing Aids, Crutches, Wheelchairs or Other Medical Devices or Equipment..... _____
- Transportation for Medicare (including mileage @ .13/mi)..... _____
- Medicare Part B Premiums..... _____
- Weight-Loss Programs To Treat Specific Medical Disorders (Excludes Diet Food Items)..... _____
- Smoking Cessation Programs..... _____
- Other (List)..... _____
- _____
- _____

B. Taxes. Did you pay any of the following kinds of taxes during the year? Note that the following taxes are NOT deductible: General Sales Tax, Federal Taxes such as Income or Social Security, Water & Sewer Taxes, Taxes on Gasoline, Diesel or Other Motor Fuels, and Utility Taxes.

- State, Local or Foreign Income Taxes (Except Amounts Shown on W-2s or 1099s). Include Amounts Paid as Estimated Tax Payments..... _____
- Real Estate Taxes (Include Amounts Paid from Escrow Accounts)..... _____
- Personal Property Taxes (Include Amounts Paid on the Annual Value of Tangible or Intangible Property)..... _____

C. Interest. Did you pay any home mortgage or investment interest during the year? Note that deductible interest does NOT include interest on personal car loans, interest on credit card purchases, and loan and credit investigation fees.

- Home Mortgage Interest Shown on Form 1098..... _____
- Points Shown on Form 1098 (Generally, points must be spread over the live of the loan, but points shown on Form 1098 are deductible in the year paid)..... _____
- Home Mortgage Interest and Points NOT Shown on Form 1098 (If paid to the person from whom you bought your home, show the person’s name, address and Taxpayer Identification Number)..... _____
- Name: _____
- Address: _____
- TIN: _____
- Investment Interest (Deduction is limited to the amount of Investment Income)..... _____

