2010 Tax Questionnaire

- *Attach additional sheets as necessary to explain any particular circumstances or elaborate on anything we might need to know.*
- *When you are finished, email or mail the form to the address above.*

I. Personal Information

	A. Taxpayer *(If you are married, this should be the name you want listed first on your tax return.)*	**B. Spouse (if applicable)** *If you are married, please provide spouse's personal information* ***even if you are filing separately or spouse is not a US citizen.***
Full Legal Name		
Social Security Number		
Date of Birth (M/D/Y)		
Occupation		
Which Tour(s) were you on?		
Citizenship *(If not US, please give country of citizenship and also state whether you are a US greencard or visa holder.)*		
C. Address to put on your tax return (where the IRS would contact you if necessary)		
D. Actual mailing address, if different:		

F. Additional Contact Information

Email:		
Alternate Email:		
Home Phone:		
Mobile Phone:		
Work Phone:		

G. Filing Status "X" one of the following

Single		
Married Filing Jointly		
Married Filing Separately*		
Head of Household		
Don't know		
**If Married Filing Separately:*	Did spouse live with you at any time during the past year? What dates?	
	Did/Will spouse file Sch. A (Itemized Deductions) for 2007?	
H. Can someone else claim you or your spouse as a dependent?		

II. United States Residency

	Taxpayer	**Spouse**
1. What US state are you a resident of?		
2. What county in that state are you a resident of?		
3. What school district in that county are you a resident of?		
4. On what date did you become a resident of that state?		
5. How many days did you spend in that state last year?		

Now go on to Section III, Income.

III. Income

A. Employee Salary/Benefits. Please complete the chart below, providing **annual**, not monthly, figures. If your employer does not automatically provide you with this information, please request it from your business office. Please also **attach your W-2's and/or foreign statement of income**. (If your income is only from self-employment, see section D below and leave this blank.)

Income Category	**Total amount received or paid on taxpayer's behalf in 2007**	**Total amount received or paid on spouse's behalf in 2007**
The amounts below are listed in what currency?		
B. Do you have Self-Employment income? *If yes, please click on the Self-Employment tab at the bottom of the screen and fill out the Self-Employment Questionnaire.*		

C. Miscellaneous Income	Describe
Did you have any other sources of income? (gambling, royalties, prizes, awards, jury duty, etc.) If so, is any of it from a foreign source? Attach details.	
D. Real Estate	(Answer yes or no below)
1. Did you rent out property to anyone? ***(If so, click on the Rental Property tab at the bottom of the screen and fill out the rental questionnaire.)***	
2. Did you buy or sell property during the past year? (If so, attach details.) If you **sold your primary residence**, please answer the questions below.	
a. What date did you purchase the property?	
b. What dates did you live in the property?	
c. What date did you sell the property?	
d. How much did you pay for the property?	
e. How much did you sell the property for?	
f. In the two years prior to the date you sold the property, did you exclude from income tax your gain on the sale of any other house?	

E. Interest and Dividend Income

Did you earn/receive any interest or dividends in 2007? (yes or no)	

If so, please submit all form 1099-INT's, 1099-DIV's, as well as information on any interest or dividends from **foreign accounts**. Please list here the institutions which issued you these.

Payer	**Form (1099-INT, 1099-DIV, etc.)**

F. Capital Gains and Losses

Did you have any capital gains or losses in 2007? (yes or no)	

If so, please submit all year-end brokerage reports, 1099-B's, K-1's etc, or comparable statements from foreign accounts. ***If not included in the reports, please provide the following for each sale of securities during the past year: Company Name, Number of shares sold, Date Acquired, Date Sold, Sales Proceeds less Commissions, Cost or Basis including Commissions.*** Please list here the institutions which issued these reports.

Payer	**Form (1099-B, K-1, etc.)**

G. Unemployment Insurance Compensation

Please enter total amount received in the past year:	

H. Other Miscellaneous Income

Did you receive any other form 1099's (MISC, R, S, G), or any other kinds of miscellaneous income, whether foreign or US? If so, list the payers here and submit the 1099's or other documentation.

IV. Individual Retirement Accounts (IRAs) and Other Retirement Accounts

	Taxpayer	Spouse
A. Traditional IRA Contributions for 2007 (amount and date of contribution)		
B. Roth IRA Contributions for 2007 (amount and date of contribution)		
C. Other retirement plan contributions you made. (what kind and how much?)		
D. Other retirement plan contributions made on your behalf by your employer (what kind and how much?)		

E. Distribution of Pension/IRA

If you received any distributions from Pension or IRA accounts during the past year, please "X" to indicate whether or not you rolled over the distribution into another IRA or pension fund. If not rolled over, please give amount of distribution and include 1099-R's.

	Taxpayer	Spouse
No distribution received:		
Received and rolled over:		
Received and not rolled over:		
Amount:		
F. IRA management fees paid in the past year:		

V. WORK RELATED EXPENSES

Employee Expenses

ACCOUNTING/BOOKKEEPING			
AGENT COMMISSIONS			
AIRFARE/BUS FARE (work related)			
ALTERATIONS (COSTUMES)			
AUDITION EXPENSES			
AUTO MILEAGE (while on tour, if applicable)			
BUSINESS CARDS			
CAR RENTALS (work related)			
CELL PHONE			
COACHING/LESSONS			
COMPUTER SUPPLIES			
DANCE TRAINING			
DRY CLEANING (work related)			
EQUIPMENT		**Purchase date:**	
FAN MAIL EXPENSES			
FAX FEES			
HOTELS (on last paystub of year)			
ICE TIME/RENTAL			
INTERNET FEES			
LAUNDRY			
LEGAL FEES (work related)			
LONG DISTANCE (work related)			
MAKE-UP (stage use)			
MUSIC (rehersals/training)			
OFFICE SUPPLIES			
PAGING SERVICE			
PDA/PAGER/LAPTOP		**Purchase date:**	
PHONE CARDS			
POSTAGE/SHIPPING			
PROMOTION EXPENSES			
PUBLIC RELATIONS			
RECORDING TAPES			
REHEARSAL CLOTHING (no street clothes)			
REPAIRS-EQUIPMENT			
SKATES			
TAX PREPARATION			
TOLLS, PARKING FEES			
COMPANY FINES/UNION DUES			
VIDEO SUPPLIES			
TOOLS (work related)		**Purchase date:**	

PLEASE ATTACH A COPY OF YOUR TOUR SCHEDULE

We wil figure the per diem that is allowed per city that you stayed in.

You are required to keep reciepts for all deductions that you write off. If you wish to send the reciepts with your information, we will be happy to store them with your other tax information.

VI. Personal Itemized Expenses

A. *Unreimbursed Medical Expenses:* Total for the year (provide a list including medical insurance premiums paid by you) (Total amount must be 7.5% or more of your adjusted gross income to be tax deductible.)

B. *Taxes paid during the year*

1. Real estate and property taxes:	
2. Taxes paid to state or local authorities to settle a previous year's tax liability:	

C. *Interest Expenses*

(Please include a copy of form 1098 or equivalent from your bank. If you purchased a home in the past year, please provide the settlement statement or closing statement as well.)

Mortgage interest paid:	
Points paid to purchase/refinance:	

D. *Charitable Contributions*

Total during the year: Please include cash amount for gifts in check or cash form as well as non-cash amounts for gifts of personal property such as clothing, furniture, books, etc. **Note: Donations must be to US charities** in order to be deductible. Do not include donations to foreign organizations. You must keep your receipts to substantiate all donations in the event of an audit.

Organization	Cash amount donated	Value of non-cash donation

If non-cash donations total $500 or more, please complete the following (attach additional pages as necessary):

1. Donated to (donee) name and address:			
2. Describe the item(s):			
3. Date of contribution:			
4. Date acquired by you:			
5. How acquired by you (purchase, gift, etc.):			
6. Your cost or basis amount:			
7. Fair Market Value (FMV):			
8. Method used to determine FMV (donee determined/ independent evaluation/your evaluation)			

E. *Casualty or Loss*

Loss amount for each occurrence during the year. This figure must exceed 10% of your adjusted gross income in order to be deductible. Please attach a statement as follows: give actual date of theft or destruction/loss and include description of the items, original cost, date of acquisition, FMV at the time of the theft or destruction/loss, FMV after (in case of damage), and total amount of reimbursements which you received from your insurance carrier.

Total casualty/loss amounts:	
F. *Job hunting* expenses for the past year:	

G. *Education Expenses*

1. Did you attend any university or graduate school in the past year?

If yes, please provide:

Institution:		
Tuition paid:		
Full-time? Half-time? Less?		

2. Did you pay interest on any school loans? Amount? (Attach 1098-E.)	

H. *Safe deposit box rental fee*

Amount paid in the past year:	

VII. Additional Notes

A. Did you pay any quarterly Estimated Taxes for the 2007 tax year? If so, please complete:

Federal:	
Date paid	Amount
Date paid	Amount
Date paid	Amount
Date paid	Amount
State:	
Date paid	Amount
Date paid	Amount
Date paid	Amount
Date paid	Amount

B. Did you receive an IRS notice of change of a prior year return? (yes or no) If yes, please submit.

C. How much did you pay in tax preparation fees in the past year?	
D. Is there any other information I should be aware of in preparing your return? Attach an explanation if necessary.	

E. How did you find out about Jackson Hewitt Tax Services? (Pick one)

Word of mouth (who?), Email announcement, Brochure, Poster, Search Engine, TIE newspaper, TIE website, Escape Artist, International Schools Review, USAbroad.org, Other website (specify), Google Advertisement, Other (specify)

VIII. Filing Details

A. Refund: If you expect to receive a refund this year, how would you like to receive it? ("X" one)

Paper check (mailed to you within 6-8 weeks)	
Apply to 2008 estimated tax payments.	
Direct deposit (deposited to your account within 2 weeks) *If you select direct deposit, please submit a voided check. (Must be a US bank.)*	
Account Number	
Routing Number	
Is this a checking or a savings acct?	

REMINDER

Please don't forget to include ALL financial documents you used to support the information you have given. However, do NOT include receipts for travel, moving, job hunt expenses, charitable donations, etc.; just keep them on file.

Checklist

____	W-2s
____	Other Income Statements
____	Tour Schedule
____	Other year-end bank, brokerage, and investment statements, incl. K-1's
____	Copy of last pay stub for 2007 (this has your hotel expense listed)
____	Payment Sheet
____	Voided check if you would like to receive any refund by direct deposit
____	Additional details as needed for items in the above pages
____	**Any other documentation you think I should see**

ADDITIONAL NOTES

If you need to add additional comments about anything in the questionnaire, please do so here, or attach a separate letter if you wish.