

DEDUCTION CHECKLIST FOR 2024

QUARTERLY ESTIMATES PAID

(PLEASE INCLUDE CANCELED CHECKS OR BANK STATEMENTS TO PROVE THIS)

| | Amount | Date Paid |
|----------|----------------------------|-------------|
| Federal | 1 st Q \$ _____ | ___/___/___ |
| | 2 nd Q \$ _____ | ___/___/___ |
| | 3 rd Q \$ _____ | ___/___/___ |
| | 4 th Q \$ _____ | ___/___/___ |
| Michigan | 1 st Q \$ _____ | ___/___/___ |
| | 2 nd Q \$ _____ | ___/___/___ |
| | 3 rd Q \$ _____ | ___/___/___ |
| | 4 th Q \$ _____ | ___/___/___ |

CONTRIBUTIONS (must have receipts for all contributions)

Total of all cash and checks \$ _____
Total value of non-cash \$ _____

Name of Charity _____

Address _____

Date of Contribution ___/___/___

Total \$ amount of non-cash donation \$ _____

Please list on separate paper for more than one

Charitable Mileage _____ Miles

MEDICAL, DENTAL, OPTICAL

Prescriptions \$ _____
Health ins Premiums (after tax) \$ _____
Doctor, Dentist, Hospital \$ _____
Eye Glasses, Contacts \$ _____
Medical Miles _____

MISCELLANEOUS

College Tuition \$ _____ \$ _____

Dates Paid ___/___/___ ___/___/___

Names of Colleges _____

For whom tuition was paid _____

Must have 1098T from school!!!!!!

Must have receipts for books and/or other expense

IRA contributions \$ _____ \$ _____

Roth contributions \$ _____ \$ _____

Alimony Paid \$ _____

(Date divorce was final) ___/___/___

S.S. Number ____-____-____

Alimony received \$ _____

(Date divorce was final) ___/___/___

Child Care Expenses \$ _____

Name of Caregiver _____

Address or Caregiver _____

S.S. Number or I.D. number ____-____-____

Gambling Losses to the extent of winnings \$ _____

Student loan forgiveness amount \$ _____

TAXES

| | | |
|------------------------------|-------------------|----------|
| Primary Residence | <u>Paid</u> | \$ _____ |
| Primary Residence | <u>Amount Due</u> | \$ _____ |
| Taxable Value | | \$ _____ |
| Other property taxes | | \$ _____ |
| Describe _____ | | |
| Auto License Tags | | \$ _____ |
| Sales Tax on Large Purchases | | \$ _____ |
| Describe _____ | | |

INTEREST (paid out)

Home Mortgage \$ _____
2nd Mortgage \$ _____
PMI \$ _____
Home Equity Loan \$ _____
Points Paid \$ _____
Date Points Started ___/___/___
Land Contract Interest \$ _____
List to whom paid (A 1099 INT must be issued to them)
Name _____
Address _____
S.S. Number ___/___/___

MICHIGAN USE TAX

Internet Purchases that excluded Sales Tax \$ _____

Mail Order Purchases that excluded Sales Tax \$ _____