



RUSH
TAX SPECIALISTS
www.rushtaxspecialists.com

ITEMIZED DEDUCTIONS ORGANIZER

	TOTALS
MEDICAL AND DENTAL	
Health Insurance*	
Cancer Policy	
Co Payments	
Hospital Bills	
Doctor Bills	
Prescriptions	
Dental	
Contacts and Solution	
Hearing Aids and Batteries	
Glasses and Eye Care	
Long-term Care Premiums:	
Husband: \$ <input type="text"/>	
Provider: _____ Policy #: _____	
Spouse: \$ <input type="text"/>	
Provider: _____ Policy #: _____	
*Do not include pre tax health insurance. Check with your employer or bring pay check stub.	
TAXES	
Property Taxes	
Tax on Car Tags	
General Sales Tax	
Sales Tax on new automobile	
MORTGAGE INTEREST	
Main Mortgage	
2nd Mortgage	
*Please bring in all 1098-INT forms for each mortgage interest claimed. If you refinanced or bought a new home, please provide "settlement state" or "closing disclosure" for more deductions.	
CONTRACT FOR DEED SALES	
Seller Financed	
Paid to:	
Name	
Address	
S.S. #	
OTHER DEDUCTIONS OR CREDITS	
Residential Energy Purchases	
New Solar Panel Installation costs	

	TOTALS
GIFTS TO CHARITY	
Paid in Check or Cash	
Charitable Miles	
RMD, IRA, or Other retirement accounts donated to charity	
Non Cash Contributions* (under \$500 w/o slips)	
Goodwill (requires receipt slip + itemized list)	
Salvation Army (requires receipt slip + itemized list)	
Red Cross (requires receipt slip + itemized list)	
Please note: Attach donation slips to itemized lists. Price guide lists for donation items values are available for download from our "helpful documents" section on our website.	
JOB RELATED EXPENSES	
Union Dues	
Uniform Purchases	
Uniform Cleaning	
Hand Tools or Equipment	
License (i.e. Teacher, Nurse, Boiler, etc)	
Seminars	
Seminar Mileage	
Hotel Bills	
OTHER DEDUCTIONS OR CREDITS	
Gambling Losses (only up to winnings)	
Student Loan Interest	
College Tuition and Fees need 1099-T form	
College Books, Supplies	
K-12 School supplies, math/science. camps, music lessons & Inst. rental, computers, scientific calc, smart phone, tutoring, dance, tuition. *no deduction for sports	\$ <input type="text"/>