ITEMIZED DEDUCTIONS WORKSHEET

MEDICAL EXPENSES

Insurance Premiums ____
Doctors/Dentists/Nurses ____
Glasses/Prosthesis ____
Prescription Drugs ____
Medical Mileage ____
Long-Term Care Coverage ____

TAXES

Paid to State Last Year ____
Property Taxes ____
Ad Valorem/Personal ____

INTEREST (bring 1098)

Home Mortgage ____
Home Equity ____
Mortgage Insurance Premiums ____

CHARITABLE CONTRIBUTIONS (You MUST have statements from charities)

Church/Synagogue ____
Non-Profit Organizations ____

____

Non-Monetary Donations ____
(Salvation Army, Goodwill, etc.)
Charitable Mileage ____

OTHER DEDUCTIONS/CREDIT

Student Loan Interest ____
Child Care: Paid ____
Name ____
Address ____

____

Federal ID# ____

Education: Student ____
(Need 1098-T) Tuition ____
Year in School ____

IRA Contributions for Current Tax Year:
Taxpayer ____
Date ____ IRA/Roth
Spouse ____
Date ____ IRA/Roth

Health Savings Account ____
Contribution ____
Distribution ____

SELF-EMPLOYMENT WORKSHEET

Income
Gross Receipts ____
Expenses
Advertising ____
Auto Expenses ____
Business Miles ____
Total Miles ____
Gasoline ____
Repairs ____
Other Expenses ____
Gifts ____
Hotel/Motel ____
Contract Labor ____
Insurance ____
Auto ____
Business ____
Internet ____
Interest ____
Legal/Professional ____
Licenses ____
Equipment Cost ____

Expenses cont'd.
Meals & Entertainment ____
Office Expenses ____
Publications ____
Rent ____
Repairs/Maintenance ____
Small Tools ____
Software ____
Storage Fees ____
Supplies ____
Taxes ____
Telephone
Cell ____
Landline/2nd Phone Line ____
Travel ____
Uniforms ____
Other ____

____

Date Purchased ____

OFFICE IN HOME

Square Footage of Office ____________
Electricity ____________
Sanitation ____________
Exterminator ____________
Square Footage of Home ____________
Gas ____________
Homeowner's Insurance ____________
Other ____________

RENTAL PROPERTIES

Rental Income ____________
Expenses
- Advertising ____________
- Auto ____________
- Cleaning/Maintenance ____________
- Insurance ____________
- Legal/Professional ____________
- Management Fees ____________

Expenses cont'd.
- Mortgage Interest ____________
- Other Interest ____________
- Repairs ____________
- Supplies ____________
- Taxes ____________
- Utilities ____________

REMEMBER: YOU MUST BRING THESE FORMS

1098-E	Student Loan Interest
1099-INT	Interest from Bank, etc.
1099-R	Retirement/IRA Income
W-2	Wages
K-1	Income from Partnership/ S Corporation
1098	Mortgage Interest
1098-T	Tuition Paid
1099-DIV	Dividends on Stock
1099-G	State Refund/Unemployment Income
W-2G	Gambling Income
1095-A/B/C	Health Care
SSA-1099	Social Security Benefits