4900 O'Hear Ave, Suite 100
North Charleston, SC 29405
(843) 572-3030
www.StratusAccountants.com

TAX YEAR

_____

*Use as a reminder list or enter amounts. *** Not a complete list of possible deductions.*

Medical and Dental: (Subject to Adjusted Gross Income limitations)

Dr..... $_____
Dr..... $_____
Dr..... $_____
Dr..... $_____
Operations..... $_____
Prescription Drugs..... $_____
Med/Dental Insurance..... $_____
Long-term Care Ins..... $_____
Hospital and Emergency..... $_____

Lab and X-Ray..... $_____
Visiting Nurses/In-home..... $_____
Dental..... $_____
Dentures and Braces..... $_____
Glasses/Contact Lenses..... $_____
Supplies..... $_____
Hearing Aids/Batteries..... $_____
Orthopedic Shoes..... $_____
Therapy Treatments..... $_____

Canes/Crutches/Braces..... $_____
Wheelchairs..... $_____
Doctor Prescribed
A/C..... $_____
Vaporizers..... $_____
Therm./Bandages..... $_____
Other..... $_____
Medical Miles Driven..... _____

Taxes (Do not include rental property)

Real Estate Tax Paid..... $_____
(main home, second home, land, etc.) $_____
$_____
$_____
Personal Property Tax paid..... $_____
(cars, trucks, watercraft, etc.) $_____
$_____
$_____
Prior Year State Income Tax $_____
Refund..... $_____

Contributions/Donations:

Church..... $_____
College (Not Tuition Paid)..... $_____
Other..... $_____
$_____
Value of furniture..... $_____
clothing given..... $_____
$_____
Volunteer work expenses... $_____
Church, Scouts, School, etc..... $_____
Auto Miles Driven..... _____

Interest Paid:

Home Mortgage Interest..... Submit 1098
2nd Mortgage..... Submit 1098

Points Paid @ closing..... Submit 1098
Investment Interest..... $_____
Home Mortgage to Indiv..... $_____

Name _____
Address _____
_____

Casualty Losses (Contact our office):

Accident, Fire,Theft, and
Natural Disasters.....

Education Expenses:

Submit 1098-E for Student Loan Interest
Submit 1098-T for college tuition
Required tax organizer covers these forms

Childcare Expenses:

Submit caregiver letter containing provider's address, EIN, qualified expenses

Notes: