

**2017 TAXES WORKSHEET
SCHEDULE A (FORM 1040)**

Name _____

Date _____

Provide the following items in addition to amounts for the items in the worksheet below:

- Form 1098 – reports mortgage interest and property taxes
- Tax Payments (Refunds) Worksheet - INDIVIDUAL (FORM 1040) – provides estimated state income tax payments

Description	Amount
Property taxes paid not included in mortgage payments – Principal residence	
Property taxes paid not included in mortgage payments – Properties held for investment	
Sales tax on regular purchases (to claim sales tax instead of state income tax)	
Sales tax on large purchases – autos, boats, etc. (to claim sales tax instead of state income tax)	
Personal property taxes based on value of assets (e.g., tax included in auto registrations)	

You will not need to provide receipts supporting the above amounts, but you are required to retain them for your records.

Comments:

2017 INTEREST EXPENSE WORKSHEET SCHEDULE A (FORM 1040)

Name _____

Date _____

Provide the following items in addition to amounts shown in the worksheet below:

- Form 1098 – Mortgage Interest Paid
- Closing (HUD) statement – when properties are purchased or sold

Use the schedule below to report interest paid and NOT included on Form 1098.

Description	Amount
Mortgage interest - Principle Residence	
Mortgage interest - Vacation Residence(s)	
Mortgage interest - Other Investment Properties	
Mortgage interest - Paid to an individual (provide details)	
Other -	
Investment interest (provide details)	

You do not need to provide receipts supporting the totals provided above, but you are required to retain them for your records.

Comments:

Client Signature and Date: _____)