

Itemized Deductions (Schedule A)

Note: Generally, this applies to you if you own a home, make over \$65,000, have lots of unreimbursed expenses at your job, or all of the above. Be sure to have all the following documents and/or figures totaled and written down or printed out and in hand at that start of your appointment. It is not necessary for you to fully fill in this form, but it is important that you have all the totals written down or printed out before your appointment begins. Please have the information in this order also, and it will help the appointment move quicker.

INCOME TAXES PAID:

State Income Tax Paid with last year's tax return- bring 1099-G if possible
State Income Tax Paid this tax year for last year's estimated taxes

OTHER TAXES PAID:

Real Estate Taxes Paid- from 1098 mortgage statement or if land from tax statement
DMV Fees Paid- only amount allowed from property tax, please bring both copies of registration

INTEREST PAID:

Home Mortgage Interest: Please bring all mortgage interest statements for all loans. If the statement is unavailable bring a list of each bank and amount of mortgage interest paid to each bank for the entire year. Provide the same information for mortgage insurance premiums also.
New home purchases, bring HUD statement from closing packet.

CASH DONATIONS:

Bring a list of all Non Profit companies you donated money to this along with this form if the list doesn't fit below. We need the name of the Organization and the amount of money donated by cash, check, or card.

NON-CASH DONATIONS:

Bring all receipts for non-cash donations along with the value of the donation, and that date you donated the items.

OTHER MISCELLANEOUS DEDUCTIONS:

Unreimbursed Employee Expenses: Bring a list of the total for any unreimbursed expenses at your job such as job travel, union dues, job education, business miles,

etc. If expenses are significant or numerous, please also see form “Unreimbursed Employee Exp. & Vehicle Exp. (2106).”

Tax Preparation Fee you paid last year-

Investment Fees-

Safe Deposit Box Fees-

MEDICAL & DENTAL EXPENSES: (note, medical expenses need to be bigger than 10% of your income to begin to help. So, if the total is less, don't bother putting Medical expenses together).

Medicare from SSA form-

Prescription Meds & Drugs-

Doctors, Dentists, Nurses-

Hospitals & Nursing Homes-

Insurance Premiums-

Long Term Care Premiums (Taxpayer)-

Long Term Care Premiums (Spouse)-

Lodging & Transportation-

Medical Miles Driven-

Other Medical & Dental Expenses-