

TAX ORGANIZER – Itemized Deductions

T = Taxpayer S = Spouse

Medical and Dental Expenses – not reimbursed or paid with pretax dollars. Deductible only if net expenses exceed 7.5% of your AGI. Example: AGI is \$60,000, so any amount exceeding \$4,500 (7.5% of AGI) will be deductible.

Medical Insurance Premiums paid by you \$ _____
 Long-term care premiums – T \$ _____
 Long-term care premiums – S \$ _____
 Dr/Dentist/Chiropractor/Hospital \$ _____
 Prescribed drugs/Insulin & supplies \$ _____
 Non-prescription medical supplies \$ _____
 Vision /hearing exams / supplies \$ _____
 Nursing or Long-term care facility \$ _____
 Other: _____ \$ _____
 Other: _____ \$ _____
 Other: _____ \$ _____
 Miles driven for medical purposes _____ miles
 Parking fees for medical purposes _____ miles
 Lodging while obtaining medical treatment (limited to \$50 per night, per person) \$ _____

Tax Paid

Real Estate (Property) – Residence \$ _____
 Real Estate (Property) – 2nd Home \$ _____
 Real Estate (Property) – REFUND \$ _____
 Sales tax-vehicle,boat,building materials \$ _____
 Personal Property taxes (only if based on value and are changed annually) \$ _____
 Other: _____ \$ _____

Interest Paid Need description of use of the money

Mortgage Interest – need copy of 1098
 Home Equity Loan – need copy of 1098
 Mortgage interest to an individual \$ _____
 Holder name: _____
 Holder address: _____
 Holder city, State, Zip: _____
 Holder SSN or EIN: _____
 Investment Interest \$ _____
 Other: _____ \$ _____
 Other: _____ \$ _____

Charitable Donations – Monetary donations under \$250 each need only be substantiated by a bank record (such as a cancelled check). Donations greater than \$250 require a written acknowledgement from the charity AND it must state "no goods or services were provided (or the value of such if provided). Donations for the benefit on one (including a family) are NOT deductible. For example, you donate to GOFUNDME page of John Smith suffering from cancer –NOT DEDUCTIBLE; however, a donation to the American Cancer Society, etc. is deductible.

Churches or Synagogues \$ _____
 Boy/Girl Scouts, Boys & Girls Clubs of America, 4-H, FFA \$ _____
 Other: _____ \$ _____
 Other: _____ \$ _____
 Other: _____ \$ _____
 Other: _____ \$ _____

NOT deductible: Political contributions, Country Clubs, FOPs, Civic Leagues, Social Clubs, Chambers of Commerce, Foreign Charities UNLESS paid a US based group, Homeowner's Associations (list not complete)

Out-of-Pocket Expenses for charity work \$ _____
 Charitable Miles \$ _____

Non-Monetary Donations- Please attach a list or the donation receipt of each donation. Must include date, Donee, general description of goods donated (household, clothing, electronics, etc) and the fair market value of the total donation If the total value of all non-cash donations for the year is \$500 or less, this step can be omitted. Just write the value of all donations here: \$ _____

Miscellaneous & Job Expenses

Not deductible on Federal but on some state tax returns.

Union and Professional Dues \$ _____
 Tools & Supplies \$ _____
 Uniforms & Safety Equipment \$ _____
 Professional Publications \$ _____
 Job-related Education _____ \$ _____
 Job seeking expenses in the same field-
 Travel/Air Fare/Lodging \$ _____
 Meals while out of town overnight \$ _____
 Employment Agency Fees/Resume \$ _____
 Other: _____ \$ _____
 Investment Expenses \$ _____
 Safe Deposit Box \$ _____
 Other: _____ \$ _____
 Other: _____ \$ _____
 Other: _____ \$ _____
 Other: _____ \$ _____