

2009 ITEMIZED DEDUCTIONS WORKSHEET

For 2009 the "Standard Deduction" is \$11,400 on a **Joint Return**, \$8,350 for a **Head of Household**, and \$5,700 if you are **Single**. If you normally itemize your personal deductions or even think that itemized deductions might benefit you this year, we will need to know the following expenses. You could record these expenses on this worksheet or just use this worksheet as a checklist of what would be deductible. If you will be deducting your personal deductions on your 2009 tax return, we would like you to bring the receipts for your deductible expenses with you at the time of your tax interview appointment.

Medical and Dental Expenses

During 2009, did you pay for any Out of Pocket Medical or Dental Expenses

with "after-tax dollars" that might exceed 7 1/2% of your income? [] YES - NO []

If "YES", we will need a separate sheet of paper that lists the amounts you **PAID** with "**after-tax dollars**" in 2009 for all Medical, Dental, Vision, Insurance, Etc. Expenses such as:

- Medical Care Insurance Premiums - Dental Insurance - Prescription Drug Insurance
- Medicare Part B and Part C and Part D Premiums - Vision Insurance - Long Term Care Insurance
- Out of Pocket Medical Expenses - Out of Pocket Dental- Out of Pocket Prescriptions
- Medical Mileage: _____ Miles @ 0.24 = _____

Casualty or Theft Losses

For 2009, personal casualty or theft losses are deductible only if they exceed 10% of your income. If you had property that was stolen or was damaged by fire, storm, car accident, etc., and your loss after insurance reimbursement may exceed 10% of your income, we will need details of the loss such as date of the loss, the original cost of the property, the market value before and after the loss, police report, etc.

Miscellaneous Expenses

For 2009 certain Miscellaneous Expenses are deductible only if they exceed 2% of your income.

NOTE: Expenses as an EMPLOYEE MUST be required by your employer, the expenses must be substantiated, and any reimbursements must be subtracted from these expenses.

If you think your miscellaneous expenses may exceed 2% of your income, we will need to know the amount paid in 2009 for the following:

Investment Publications and Fees _____	Income Tax Preparation Fees _____
Employment Agency Fees _____	Union Dues Paid in 2009 _____
Certain Job Hunting Expenses _____	Unreimbursed Safety Equipment _____
Certain Legal and Accounting Fees _____	Unreimbursed Tools & Supplies _____
Safe Deposit Box Rental _____	Employment Licenses _____
Professional Dues and Publications _____	Qualified Education Expenses _____
The cost of uniforms and shoes required in your employment _____	
The cost to maintain uniforms required in your employment _____	
Travel & Entertainment Expenses _____	Other _____

Details of the use of your vehicle in connection with your employment other than you just getting to and from work: