

**MEDICAL EXPENSES PAID**

To be deductible, medical expenses must exceed 7½% of your adjusted gross income, and then, only to the extent the amount that exceeds the 7½% floor is deductible. Example: Your income is \$40,000 for the year - your medical must exceed \$3,000. Do not include medical expenses that were reimbursed by insurance or paid for by flex spending or Sec. 125 plans.

Hospital, Medical, Dental, Medicare* & Insurance Premiums		
Doctors, Dentists, Psychotherapy & Psychological Counseling		
Hospitals, Nursing Home, Nursing Care, Lodging, etc.		
Prescription Drugs (no "over-the-counter" drugs)		
Glasses, Hearing Aids, Batteries, etc.	Auto Travel	mi
Lab & X-Ray	Parking Fees	
Supplies, Rentals, etc.:	Phone (toll charges)	
Other:		
Insurance Reimbursement (only for amounts listed above)	{	}

\*Amounts withheld from Social Security Benefits only.

**TAXES PAID**

Real Estate - Home & 2nd Home ONLY (not rental)	
Real Estate - Investment Property (land, etc.) (not rental)	
Vehicle License Fees: (1) (2) (3) (4)	
Personal Property Tax (boat, plane, etc.)	
State Income Tax Paid (provide cancelled checks)	
Balance Due or Last Year's Return	Prior Year's Tax or adjustment
Extension Payment	Last Year's 4th Quarter paid Jan. of this year

**HOME MORTGAGE INTEREST PAID**

Provide 1098s		Primary Home	Second Home
Enter Rental Interest in Rental section.			
1st TD	Paid to a Bank, S & L, etc.*		
	Paid to an Individual (must list name, address & SSN below)**		
2nd TD	Paid to a Bank, S & L, etc.*		
	Paid to an Individual (must list name, address & SSN below)**		
Home Equity Loan			
Individual's Name:		SS#	
Address:			
*Amounts must agree with Form 1098 issued by the financial institution. If not, check here <input type="checkbox"/>			
**If Form 1098 was issued in another's social security number, enter that person's name and Social Security number here.			
Name:		SS#	
If the second home is a qualified motor home, boat, etc., list the name of the payee here:			
Did you refinance during the year? If so, provide final escrow statement.		YES	NO
Does your home equity loan exceed \$100,000?		<input type="checkbox"/>	<input type="checkbox"/>
Does the sum of all home mortgages exceed \$1,000,000?		<input type="checkbox"/>	<input type="checkbox"/>

**INVESTMENT INTEREST PAID**

Interest paid for investments, such as land, stocks, etc.	
Vacant Land	Brokerage Margin Accounts
Other:	

**CHILD OR DEPENDENT CARE EXPENSES**

Care must enable you to work (or look for work) or attend school FULL TIME. Care must be for a child under 13 or individual who is physically or mentally incapable of self care. IRS matches employer benefits SS# and EID#.					
<input type="checkbox"/> If employer provides dependent care benefits.					
PROVIDER INFORMATION					
Payee SS# or EID# MANDATORY unless exempt organizations.					
Name	Amount	Child:	Amount	Child:	Amount
Address					
Phone					
SS or EID Number					
Name	Amount	Child:	Amount	Child:	Amount
Address					
Phone					
SS or EID Number					

**CHARITABLE CONTRIBUTIONS**

CASH All cash contributions must be documented with either a bank record or written verification from the charity.	
House of Worship	Red Cross
Payroll Deduction	Other:
Cancer	Other:
NON-CASH - Household and clothing items must be in good or better condition. A written receipt is required for donations of \$250 or more, and a detailed list should be included with your return if the total exceeds \$500.	
Fair Market Value of Clothing & Household Items Contributed	
Automobile Travel for Charitable Purposes	mi
Expenses in connection with a charitable organization	
Explain:	
Vehicle Donation (provide 1098-C)	

**MISCELLANEOUS DEDUCTIONS**

List all travel expenses including auto, out of town meals, hotel, air fare, etc., in sections for business mileage, and away-from-home expenses (next page).		
Do not enter expenses you have listed elsewhere	You	Spouse
Attorney Fees (to protect taxable income)		
Business Gifts (see business expense instructions on next page)		
Dues: Union & Professional		
Employment & Resume Fees		
Entertainment & Meals (see business expense instructions on next page) enter 100%		
Gambling Losses (limited to taxable winnings)		
Insurance - Business (E & O, malpractice, etc.)		
Investment Expenses	Publications & Journals	
	Other:	
IRA or SE Plan Fees Paid by You (not deducted from plan)		
Licenses, Fees, Credentials, etc.		
Publications, Books, etc., used in Business		
Safe Deposit Box		
Tax Preparation & Consulting Fees		
Telephone (business calls only)		
Tools, Supplies, Equipment (provide list of items with a useful life of over one year)		
Uniforms - Purchase		
Uniforms - Cleaning		
Other:		

**EDUCATION EXPENSES**

CAUTION: These expenses qualify for tax credits, deductions, and are used to justify certain exclusions and tax or penalty free distributions. Expenses must be segregated by student. Use a different column for each student in the family.			
STUDENT:	THIS COLUMN IS DESIGNATED FOR:		
Taxpayer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dependent:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dependent:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOR TUITION CREDIT ONLY - Qualified Educational Instruction			
Check if at least half-time student	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post-Secondary - First 2 years			
After First 2 years			
Fees - Enrollment/Attendance Only			
Other Expenses - DO NOT COMPLETE Unless qualifying for tax or penalty-free Coverdell Account distributions, Savings Bond Interest Exclusion, or student loan interest deductions. Similar expenses for continuing education should be entered in different section below.			
Tuition K - 12 (for coverdell distributions only)			
Books/Supplies			
Room/Board			
CONTINUING EDUCATION EXPENSES - Education for the taxpayer & spouse only & ONLY if job related			
Tuition & Fees			
Seminar Fees, etc.			
Books/Supplies, etc.			
Travel			(list in appropriate area opposite page)