



# Potential Deductions and Credit Items

<p style="text-align: center;"><b>ADJUSTMENTS</b></p> <hr/> Payments to an IRA: <b>TYPES:</b> Traditional, Roth, SEP, SIMPLE Taxpayer amount: \$ _____ Type: _____ Spouse amount: \$ _____ Type: _____ Penalty for Early Withdrawal - _____ Alimony Paid: \$ _____ SS# _____ Self -Employed Health INS _____ Student Loan Interest _____ Payments to HSA / MSA: Taxpayer \$ _____ Spouse \$ _____ Classroom Materials for Educators \$ _____	<p style="text-align: center;"><b>CONTRIBUTIONS</b></p> <hr/> Churches (statement) \$ _____ Other Contributions of money \$ _____ Charitable Auto Mileage _____ Volunteer Expenses (statement) \$ _____ Property Donated (for which you have receipts (FMV) Bring documentation if over \$500.00 \$ _____ Auto, Boat, Donations (Form 1098C) \$ _____ Qualified Charitable Distribution from IRA? Y or N (Bring details)
<p style="text-align: center;"><b>MEDICAL EXPENSES</b></p> <hr/> Insurance & Medicare (not pretax) \$ _____ Long Term Care Insurance \$ _____ Prescriptions \$ _____ Eyeglasses, Hearing Aids & Batteries \$ _____ Doctors \$ _____ Dentists \$ _____ Hospital / Ambulance \$ _____ Auto Mileage (Miles) _____ Other Medical Expenses, Travel \$ _____ Reimbursement \$ _____ Work Reimbursement \$ _____	<p style="text-align: center;"><b>CASUALTY &amp; THEFT LOSSES</b> (In Presidentially declared disaster areas)</p> <hr/> Cost of Property Lost \$ _____ Fair Market Value of Property \$ _____ Ins. Reimbursement Received \$ _____
<p style="text-align: center;"><b>TAXES</b></p> <hr/> Real Estate Taxes \$ _____ Sales Tax paid: Vehicles, boats, planes \$ _____ Sales Tax paid: (from receipts) \$ _____ Vehicle License Tabs, Pers. Prop Tax \$ _____ State taxes paid for Earlier years \$ _____	<p style="text-align: center;"><b>AUTOMOBILE EXPENSE</b></p> <hr/> Total Miles _____ Business Miles _____ Commuting Miles _____ Personal Miles _____ Odometer Reading: Beginning _____ Odometer Reading: Ending _____ documentation if over \$500.00 _____ Gas & Oil \$ _____ Interest \$ _____ Tolls & Local Transportation \$ _____ Lease Payments \$ _____ Parking \$ _____ Other \$ _____
<p style="text-align: center;"><b>State Tax Estimates</b></p> Date pd: _____ \$ _____ Date pd: _____ \$ _____ Date pd: _____ \$ _____ Date pd: _____ \$ _____	<p style="text-align: center;"><b>BUSINESS EXPENSES</b></p> <hr/> Taxes \$ _____ Utilities \$ _____ Insurance \$ _____ Repairs \$ _____ Supplies \$ _____ Business Meals \$ _____ Business Travel \$ _____ Advertising \$ _____ Professional Dues / Memberships \$ _____ Legal / Professional Fees \$ _____ Wages (Bring W2's / 941 / 1099's) \$ _____ Contract Labor (1099) \$ _____ Equipment (Bring list with details) \$ _____ Other \$ _____ <b>(If your primary place of business is in your home, bring all home related expenses, total square footage and square footage of space that is exclusively and regularly used for business.)</b>
<p style="text-align: center;"><b>Federal Tax Estimates</b></p> Date pd: _____ \$ _____ Date pd: _____ \$ _____ Date pd: _____ \$ _____ Date pd: _____ \$ _____	<p style="text-align: center;"><b>CHILD CARE EXPENSES</b></p> <hr/> Childcare \$ _____ <b>Bring Name, Address, ID number of provider(s) and amount paid</b> Do you have a dependent care benefit plan at work? Y or N
<p style="text-align: center;"><b>INTEREST EXPENSE</b></p> <hr/> Home Mortgage – Paid to Financial institutions (form 1098) First Mortgage / Refinance \$ _____ Loan Origination Fee / Disc. Fee \$ _____ Second Mortgage \$ _____ Home Equity \$ _____ Equity Loan used only to buy/ build / improve home? Y or N Mortgage Insurance \$ _____ Second home Interest Payments \$ _____ Home Mortgage – Pd to Individuals \$ _____ Attach name, address, social security number Investment Interest: Margin Acct \$ _____ Other Investment Interest \$ _____	<p style="text-align: center;"><b>ADOPTION EXPENSES – (bring papers)</b></p> <hr/> Amount Paid: \$ _____ Date Finalized: _____
<p style="text-align: center;"><b>OTHER MISCELLANEOUS EXPENSES</b></p> <hr/> Gambling Losses \$ _____ Impairment Related Work Expenses \$ _____	<p style="text-align: center;"><b>ENERGY CREDITS</b></p> <hr/> Solar <input type="checkbox"/> Wind <input type="checkbox"/> Geothermal <input type="checkbox"/> Cost: \$ _____
<p style="text-align: center;"><b>HIGHER EDUCATION EXPENSES (form 1098T)</b></p> <hr/> PSEO Tuition / Req Fees paid \$ _____ Date: _____ Year in School: _____	

Please Sign here: \_\_\_\_\_ Date: \_\_\_\_\_