

PERSONAL ITEMIZED DEDUCTIONS WORKSHEET

NON - BUSINESS

Medical Expenses (Not Flexed)

Health Insurance (Non Pre-Tax) \$	Hospitals	\$
Long Term Care Insurance \$	Required Nursing Home Care	\$
Dental Insurance \$	Lodgings	\$
Prescriptions (no over-counter) \$	Ambulance	\$
Doctors, Dentists, Etc.	Hearing Aid, Batteries, Repairs	\$
	Prescription Clothing (support hose, shoes)	\$
	Prescribed Equipment (rental, cost)	\$
	Child Birth Class	\$
Anesthesiology	Schooling for Mental/Physical Handicap	\$
Eye Glasses, Contact Lenses, Exams	Total Medical Miles	\$
Alcohol or Addiction Therapy	Other	\$
Parking		
Other		

Taxes

Real Estate:	Personal Property:	\$
Home \$	Other	\$
Second Home \$		
Other \$		

Interest

Home Mortgage paid to financial institution (bring in 1098)	Second Mortgage paid to financial institution (bring in 1098)	\$
Home Mortgage Paid to Individual (bring name, SS#, & address)	Second Mortgage Paid to Individual (bring name, SS#, & address)	\$
Points \$	Closing Papers	\$
Home Equity Loan: Form 1098 \$	Investment Interest (List Details)	\$

*** If you refinanced or purchased your home, please bring in loan documents.

MORE DEDUCTIONS ON BACK

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NON - BUSINESS

Contributions

Cash Contributions for which you have receipts, cancelled checks, payroll deductions, etc.

Name	Amount
	\$
	\$

Other Cash Contributions which you have no receipts, may need written log or other record

Name	Amount
	\$
	\$

Non-Cash items: Fair market value on clothing, furniture, appliances: List organization, item, & value. (If over \$250, must have receipts and detailed information) **For payroll deductions, you must provide pay stub or W2 AND pledge card showing name of donee organization.**

Name	Amount
	\$

Name	Amount
	\$

Endangered Resources Donation \$

Travel/Transportation volunteer work \$

Parking \$

Mileage

DEDUCTIBLE

Churches, synagogues, & other religious org.
 Federal, State, Local Governments for public purposes
 Non-profit schools & hospitals
 Public parks & recreational facilities
 Charitable non-profit org. e.g. Salvation Army, Red Cross, Goodwill, Scouts, Etc.
 War veterans' groups
 Having an exchange student live with you (\$50/month)
Receipts are needed for contributions of \$250 or more

NOT DEDUCTIBLE

Civic leagues, social & sports clubs, labor unions, chambers of commerce
 Most foreign organizations
 Groups run for profit
 Groups whose purpose is to lobby
 Homeowner's associations
 Individuals (no matter how needy they are)
 Cost of raffle, bingo or lottery tickets
 Dues paid to country clubs, lodges, etc.
 Value of your time or services
 Value of blood given to a blood bank

Casualty & Theft Losses

Must Exceed 10% of GROSS INCOME

Casualty Date

Insurance Reimbursement \$

Kind of Property

Date Purchased

Fair Market Value (Before) \$

How Destroyed

Cost & Improvements \$

Fair Market Value \$

Miscellaneous Deductions

Investment Expense:

Safe Deposit Box \$

Journals/Subscriptions \$

Phone/Postage/Mileage \$

Tax Preparation Fee \$

IRA/Keough Fees (Paid Separately) \$

Job Expenses:

Enhancements--long dist, taxes, etc. \$

Malpractice Insurance \$

Safety Equipment \$

Job related education tuition/fees \$

Books/Supplies \$

Workshops/Seminars \$

Lodging/Food \$

Job Hunting: Mileage/Travel \$

Employment Agency Fees \$

Resume/internet//Postage, Etc \$

Education Expenses Paid \$

Professional Trade Journals \$

Job Expenses: W-2 filers only

Union Dues/Initiation Fees \$

Professional Dues/Licenses \$

Tools - small \$

Tools & Equipment - Depr. \$

Uniforms - cost/cleaning \$

Job Supplies \$

Required Cell Phone \$

Mileage

(logged miles required)