

2023 PERSONAL ITEMIZED DEDUCTIONS WORKSHEET

NON - BUSINESS

Medical Expenses (Not Flexed)

Health Insurance (Non Pre-Tax)	\$
Long Term Care Insurance	\$
Dental Insurance	\$
Prescriptions (no over-counter)	\$
Doctors	\$
Dentists	\$
Vision Expenses	\$
Medical Miles	\$
Other:	\$
	\$
	\$
	\$
	\$
	\$
	\$

Taxes

Real Estate:	
Home	\$
Second Home	\$
Other	\$
Personal Property:	
Other	\$
Interest	
Home Mortgage Interest	\$
Second Mortgage Interest	\$
Points Paid	\$
Home Equity Loan Interest	\$
Investment Interest	\$
*If you refinanced or purchased your home this year, please bring in loan documents	

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
	\$
	\$

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