

# Possible Tax Deductions and Credits

## IRA

Taxpayer.....\$ \_\_\_\_\_ Traditional  Roth   
Spouse.....\$ \_\_\_\_\_ SIMPLE  SEP

## MEDICAL EXPENSES

Insurance & Medicare (not pretax).....  
Long term care insurance.....  
Prescriptions.....  
Eyeglasses, hearing aids & Batteries .....  
Doctors.....  
Dentists.....  
Hospital/Ambulance.....  
Auto Mileage.....  
Other medical expenses, travel.....  
Reimbursement.....  
Did you receive reimbursement at work? Y\_\_\_ N\_\_\_

## TAXES

Real Estate Taxes .....  
State taxes paid for earlier years.....  
Sales tax paid on vehicles, boats, planes..  
Sales tax paid (from receipts).....  
Vehicle license tabs, pers. prop. tax.....

## INTEREST EXPENSE

Home Mortgage-Paid to Financial Institutions (**Form 1098**)  
First mortgage/refinance.....  
Loan origination fee/discount fee.....  
Second Mortgage.....  
Home equity.....  
Equity loan used only to buy/build/improve home? Y\_\_\_ N\_\_\_  
Mortgage Insurance.....  
Second Home Interest Payments.....  
Home mortgage paid to individuals..  
(name, address, SSN).....  
Investment Interest: Margin Acct .....  
Other Investment Interest.....

## OTHER MISCELLANEOUS EXPENSES

Gambling Losses (Profit & Loss).....  
Impairment Related Work Expenses .....  
Student Loan Interest (Form 1098-T).....  
Self Employed Health Insurance.....  
Classroom Supplies for Educators.....  
Payments to HSA/MSA:  
Taxpayer \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_

## CONTRIBUTIONS

Churches (received).....  
Other Contributions of Money (received).....  
Charitable Auto Mileage.....  
Volunteer Expenses.....  
Property Donated (received).....  
FMV documentation needed if over \$500  
Auto/Boat Donations (1098-C).....  
Qualified Charitable Contributions from IRA \$ \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## HIGHER EDUCATION EXPENSES

Post Secondary Tuition/Req. Fees Paid....  
Date: \_\_\_\_\_ Year in School \_\_\_\_\_

## CASUALTY & THEFT LOSSES

Cost of Property Lost .....  
Fair Market Value of Property.....  
Insurance Reimbursement Received....  
Federally Declared Disaster Area Y\_\_\_ N\_\_\_

## BUSINESS AUTOMOBILE EXPENSE

### Mileage:

Business Miles.....  
Commuting Miles.....  
Personal Miles.....  
Total Miles.....  
Odometer Reading - Beginning.....  
Odometer Reading - Ending.....

### Vehicle Expense:

Gas & Oil.....  
Interest Expense.....  
Lease Payments.....  
Parking.....  
Other \_\_\_\_\_

\*You can only either use mileage or vehicle expense\*

## BUSINESS EXPENSES

Taxes.....  
Insurance.....  
Repairs .....  
Supplies .....  
Business Meals....  
Business Travel.....  
Advertising.....  
Dues/Memberships.....  
Legal/Professional Fees....  
Wages.....  
Contract Labor.....  
Equipment (bring details).....

Is your primary place of business in your home? If yes, bring all home related expenses, total square footage and square footage of space that is exclusively and regularly used for business.

## CHILD CARE EXPENSES

Names, addresses, and ID#s of provider(s), amount paid.  
\_\_\_\_\_  
\_\_\_\_\_

Do you have a dependent care benefit plan at work Y\_\_\_ N\_\_\_

## ADOPTION EXPENSES

Amount Paid: \_\_\_\_\_ Date Finalized: \_\_\_\_\_ (bring papers)

## ENERGY CREDIT

Solar  Wind  Geothermal   
Windows  Skylights  Exterior Doors   
Plug-in Vehicle