

NAME: \_\_\_\_\_

TAX YEAR [ \_\_\_\_\_ ]

PERSONAL ITEMIZED DEDUCTIONS		Amount	Remarks
<b>Unreimbursed MEDICAL EXPENSES</b> (Total Medical Expense must exceed 7.5% of income to be deductible)			
Doctors, Chiro, Acupunct, Dental, etc.		It's <b><u>not necessary</u></b> to categorize your medical,	
Therapists, Analysts, Rehab, Counseling		you may just list the total below, but you must	
Prescription Drugs		list your Health Insurance premiums separately!	
Tests & Diagnostics			
Hospital, Clinics, Emergency room		Total Medical Expenses: _____	
Eyeglasses, Prosthetics, Supplies, Braces		Total Medical Travel or Mileage: _____	
Long Term Care Insurance		** Do you have a high deductible? _____	
Health Insurance Premiums		** If you received Marketplace Premium Tax Credits	
Is this insurance thru a Union or an employer?		then I need to see your Form 1095-A _____	
<b>Charitable CONTRIBUTIONS &amp; DONATIONS</b>		<b>You must have receipts for ALL donations!</b>	
Cash, Check, or Credit card		For property over \$500.00, you <b>MUST</b> include donee name &	
Donated Property (present value)		address, date of donation, & how you originally acquired it, to	
		take the deduction. List this info on a separate page.	
<b>INTEREST &amp; TAXES PAID</b> Provide statements for interest paid, but just the total for your property taxes			
Mortgage interest, Co-op interest, Home equity loans, Property Taxes (total only), Student Loan Interest			
<b>ESTIMATED TAXES PAID - List amounts &amp; dates (mo, day, year) paid for EACH payment!</b>			
<b>IRS</b>		<b>STATE</b> _____	<b>LOCALITY</b> _____
date: _____	amount: _____	date: _____	amount: _____
date: _____	amount: _____	date: _____	amount: _____
date: _____	amount: _____	date: _____	amount: _____
date: _____	amount: _____	date: _____	amount: _____
<b>Check ALL that apply or may apply, or anything you want to learn more about!</b>			
THEFT or CASUALTY LOSSES		RETIREMENT SAVINGS PLANS, IRA's, SEP's	
CHILD CARE EXPENSES		TAX-FAVORED COLLEGE SAVINGS PLANS	
COLLEGE TUITION (for you or your child)		RENTAL INCOME & DEDUCTIBLE EXPENSES	
OFFICE IN THE HOME		CLAIMING PARENTS/ PEOPLE YOU SUPPORT	
JOB RELATED MOVING EXPENSES		RESIDENTIAL ENERGY CREDITS	
SELLING YOUR HOME		SALE OF BUSINESS PROPERTY	
ELECTRIC VEHICLE CREDIT (\$2500-\$7500)		STARTING A NEW BUSINESS	
INHERITANCES or INHERITED PENSIONS		SPECIAL TAX RULES FOR CD/DVD PRODUCTION	
SENDING 1099'S TO PEOPLE YOU PAY		HEALTH SAVINGS ACCOUNTS	
<b><u>These 6 Questions MUST be answered so your taxes can be completed:</u></b>			
1) Did you buy any items out of state or online for which you did not pay sales tax? Yes _____ No _____			
2) Do you own or have 'signature authority' on a FOREIGN Bank, Trust, or Financial Account? Yes _____ No _____			
3) Did you RECEIVE as an award or payment for property/services, SELL, EXCHANGE, or otherwise DISPOSE of a financial interest in a digital asset or virtual currency? Yes _____ No _____			
4) Do you have a Robinhood, Coinbase, or other type of Crypto Brokerage Account? Yes _____ No _____			
5) Are you an owner or member of an LLC or Corporation? Yes _____ No _____			
6) Did you pay a person or company \$600 or more for services rendered to your business? Yes _____ No _____			