

NAME: _____

TAX YEAR [_____]

PERSONAL ITEMIZED DEDUCTIONS		Amount	Remarks
Unreimbursed MEDICAL EXPENSES (Total Medical Expense must exceed 10% of income to be deductible)			
Doctors, Chiro, Acupunct, Dental, etc.		It's <u>not necessary</u> 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 _____	
Charitable CONTRIBUTIONS & DONATIONS		You must have receipts for ALL donations!	
Cash, Check, or Credit card		For property over \$500.00, you MUST include donee name &	
Donated Property (present value)		address, date of donation, & how you originally aquired it, to	
		take the deduction. List this info on a separate page.	
INTEREST & TAXES PAID 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			
ESTIMATED TAXES PAID - List amounts & dates (mo, day, year) paid for EACH payment!			
IRS		STATE _____	LOCALITY _____
date: _____	amount: _____	date: _____	amount: _____
date: _____	amount: _____	date: _____	amount: _____
date: _____	amount: _____	date: _____	amount: _____
date: _____	amount: _____	date: _____	amount: _____
Check ALL that apply or may apply, or anything you want to learn more about!			
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	
<u>These 6 Questions MUST be answered so your taxes can be completed:</u>			
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 are you a signator 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 _____			