

# DEDUCTIONS AND CREDIT ITEMS

## RETIREMENT

Payments To A Traditional Ira  
 Taxpayer Date \_\_\_\_\_  
 Spouse Date \_\_\_\_\_  
 Payments To A Roth Ira  
 Taxpayer Date \_\_\_\_\_  
 Spouse Date \_\_\_\_\_  
 Penalty For Early Withdrawal \_\_\_\_\_  
 Alimony Paid \_\_\_\_\_  
 Self-Employed Health Insurance \_\_\_\_\_  
 Keogh, Sep & Simple Contributions \_\_\_\_\_

## MEDICAL EXPENSES

Medical Savings Account (MSA) contributions \_\_\_\_\_  
 Health Savings Account (HSA) contributions \_\_\_\_\_  
 Insurance & Medicare premiums \_\_\_\_\_  
 Prescriptions \_\_\_\_\_  
 Eyeglasses \_\_\_\_\_  
 Doctors \_\_\_\_\_  
 Dentists \_\_\_\_\_  
 Hospital \_\_\_\_\_  
 Ambulance \_\_\_\_\_  
 Medical auto mileage \_\_\_\_\_  
 Other medical travel expenses \_\_\_\_\_  
 Hearing aids & batteries \_\_\_\_\_  
 Other medical expenses \_\_\_\_\_  
 Reimbursements \_\_\_\_\_

## TAXES

Real estate tax \_\_\_\_\_  
 State estimated tax Date pd. \_\_\_\_\_  
 Date pd. \_\_\_\_\_  
 Date pd. \_\_\_\_\_  
 Date pd. \_\_\_\_\_  
 Personal property tax \_\_\_\_\_  
 City / county tax \_\_\_\_\_  
 Sales tax \_\_\_\_\_  
 Other \_\_\_\_\_

## INTEREST EXPENSE

Home mortgage (1098) \_\_\_\_\_  
 Home mortgage – pd. to individuals \_\_\_\_\_  
 (Include name and SSN of individuals)  
 \_\_\_\_\_  
 Investment interest \_\_\_\_\_  
 Interest pd. on student loans (1098-E) \_\_\_\_\_

## CONTRIBUTIONS

Church \_\_\_\_\_  
 Other cash contributions \_\_\_\_\_  
 Charitable auto mileage \_\_\_\_\_  
 Property donated for which you have  
 receipts (fair market value) \_\_\_\_\_  
 Other \_\_\_\_\_

## CASUALTY & THEFT LOSSES

Cost of property lost \_\_\_\_\_  
 Fair market value of property \_\_\_\_\_  
 Insurance reimbursement received \_\_\_\_\_

## JOB-RELATED MOVING EXPENSES

Travel & lodging \_\_\_\_\_  
 Moving household goods \_\_\_\_\_

## BUSINESS AUTO EXPENSES

Total miles \_\_\_\_\_  
 Business miles \_\_\_\_\_  
 Gas & oil \_\_\_\_\_  
 Interest \_\_\_\_\_  
 Tolls & local transportation \_\_\_\_\_  
 Other \_\_\_\_\_

## MISCELLANEOUS

Dues & subscriptions \_\_\_\_\_  
 Education \_\_\_\_\_  
 Safety equipment \_\_\_\_\_  
 Uniforms \_\_\_\_\_  
 Job seeking expenses \_\_\_\_\_  
 Tax preparation \_\_\_\_\_  
 Tools \_\_\_\_\_  
 Business entertainment \_\_\_\_\_  
 Investment & tax advice \_\_\_\_\_  
 Safe-deposit box \_\_\_\_\_  
 Hobby losses \_\_\_\_\_  
 Gambling losses \_\_\_\_\_  
 Impairment related work expenses \_\_\_\_\_  
 Classroom expenses for teachers \_\_\_\_\_  
 Energy property installed \_\_\_\_\_  
 Other \_\_\_\_\_

## CHILD CARE EXPENSES – Bring list of monthly totals

Provider's name	Address	ID# of provider(s)	Amount pd.

## EDUCATION CREDITS (1098-T)

Name of institution	Tuition pd.	Who attended	When classes began

**LOANS:** If you borrowed money during the year, bring a list showing the amounts, dates and use of proceeds.