

Itemized Deductions Tax Organizer

Please bring the following documents to your appointment

- 1098s from all mortgage companies
- Receipts for major donations
- Appraisals for donations greater than \$5,000
- Receipts for Arizona tax credit donations
- 1098C for vehicle donation
- Closing documents for home refinance

Fill in any of the following that apply to you.

Medical expenses

Insurance premiums for medical, dental, vision (paid directly out of pocket)	\$	<input type="text"/>
Long-term care insurance (<i>you</i>)	\$	<input type="text"/>
Long-term care insurance (<i>spouse</i>)	\$	<input type="text"/>
Doctors, dentists, chiropractors, acupuncture, therapy	\$	<input type="text"/>
Hospitals, ambulances	\$	<input type="text"/>
Prescription (not over the counter) drugs	\$	<input type="text"/>
Eye exam, glasses, contacts	\$	<input type="text"/>
Medical supplies/equipment	\$	<input type="text"/>
Hearing aids and batteries	\$	<input type="text"/>
Miles driven to and from doctors, hospitals, pharmacies	Miles	<input type="text"/>

All other medical expenses: please provide list.

Interest

Investment interest (paid on loans to acquire investments)	\$	<input type="text"/>
Real estate interest paid not listed on 1098s	\$	<input type="text"/>

Taxes paid

Taxes paid on primary residence not listed on 1098s	\$	<input type="text"/>
Taxes paid on vacation home not listed on 1098s	\$	<input type="text"/>
Taxes paid on other real estate not listed on 1098s	\$	<input type="text"/>
Vehicle registration tax (auto registration)	\$	<input type="text"/>
Sales tax paid on major purchases: cars, boats, planes	\$	<input type="text"/>

Contributions

Cash contributions each under \$5,000*	\$	<input type="text"/>
Non-cash contributions total under \$500**	\$	<input type="text"/>
Expenses incurred as a volunteer	\$	<input type="text"/>
Miles driven as a volunteer	Miles	<input type="text"/>

* Cash contributions each over \$5,000; provide a list of what was donated, when and to what organization.

** Non-cash contributions total over \$500; please provide list of what was donated, when and to what organization.

Casualty losses

If you had property damaged or stolen, talk to us about it.

Other deductions

If you had gambling income, total your gambling losses here*	\$	<input type="text"/>
<i>* (No gambling income, no gambling losses deductible!)</i>		
Attorney fees to produce or protect taxable income	\$	<input type="text"/>
Bank safety deposit box	\$	<input type="text"/>
Tax preparation/consultation fees	\$	<input type="text"/>
IRA fees paid by you directly	\$	<input type="text"/>
Brokerage fees and investment expenses	\$	<input type="text"/>

Employee business expenses not reimbursed by employer

Business gifts (max \$25 per recipient)	\$	<input type="text"/>
Job-hunting and résumé expenses	\$	<input type="text"/>
Continuing education in current occupation	\$	<input type="text"/>
Union or professional dues	\$	<input type="text"/>
Entertainment and meals	\$	<input type="text"/>
Insurance: malpractice, E&O, etc.	\$	<input type="text"/>
Licenses, fees, credentials	\$	<input type="text"/>
Publications and journals	\$	<input type="text"/>
Supplies	\$	<input type="text"/>
Uniform purchase and cleaning (only if not suitable for street wear)	\$	<input type="text"/>
Phone expense (business portion only)	\$	<input type="text"/>
Tools or equipment (less than \$200 each)*	\$	<input type="text"/>

** Tools or equipment greater than \$200 each; please provide list with purchase dates.*

Home office deduction

If you believe you might qualify for an office in home deduction, talk to us.

Transportation

If you used your car to drive for business, or from one job to a second job, please complete the following:

Year, make and model of vehicle	<input type="text"/>	
Total miles driven during the year	Miles	<input type="text"/>
Miles driven for business (not commuting miles from home to work)	Miles	<input type="text"/>

