

**PERSONAL TAX DEDUCTIONS**

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

**MEDICAL EXPENSES: Deduction is the excess over 7.5% of AGI**

Medical Ins. Prem. (after tax) (Excluding Medicare)	_____	Ins. Reimbursements	_____
Medicine/Drugs, Insulin (Doctor Prescribed)	_____	Transp./Lodging	_____
Drs., Dentists, Nurses	_____	Medical Mileage	_____
Hospitals	_____	Over the Counter Prescriptions (Doctor Prescribed)	_____
X-Rays, Lab fees	_____	Other	_____
Hearing aids, Glasses, Dentures	_____		_____

Any construction expenses to accommodate the needs of a physically handicapped person? If so, please explain.

\_\_\_\_\_  
\_\_\_\_\_

**TAXES**

State & Local Income Tax from the previous year - Paid or (Refund)	_____
Real Estate - Current year billed	<b><u>Please bring in actual</u></b> _____
- Current year paid	<b><u>Real Estate Tax Bills.</u></b> _____
Current Year State Taxable Value	_____
Second Residence or Investment Property (Location _____)	_____
Auto License Fees ('84 or newer)(Excluding State Park Permits)	_____
Sales Tax Paid on a big purchase (car, boat, etc.)	_____

**INTEREST (Please bring in 1098's)**

Home Mortgage paid to Financial Institution	_____
Home Mortgage paid to Individual*	_____

\*We will need individual's name, address and social security number:  
\_\_\_\_\_

Did you refinance your home or take out a HOME EQUITY loan? If so, we need details.

Points: \_\_\_\_\_ How was money used? \_\_\_\_\_  
Length of loan \_\_\_\_\_

**CONTRIBUTIONS**

CHECKS (Need Dates Given) (over \$250 needs a statement from charity) \_\_\_\_\_

OTHER THAN CASH – if total is over \$500, we need description of property, date acquired or given, cost and value at time of donation, statement from charity.

DID YOU DONATE A CAR, BOAT OR AIRPLANE? Need confirmation from charity & value.

\_\_\_\_\_

VOLUNTEER MILEAGE \_\_\_\_\_

**CASUALTY LOSS (Only if attributable to a federal declared disaster)**

Total Loss	_____
Insurance Reimbursements	_____

**MOVING EXPENSES (Only members of Armed Forces in active duty)**

Transporting household goods	_____
Travel and Lodging only *	_____
Less Reimbursements	( _____ )

\*Pre-move costs and meals are not deductible