

Itemized Deductions Tax Organizer

Client's name

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 from personal funds, not through employer or paycheck)	\$
Long-term care insurance (<i>you</i>)	\$
Long-term care insurance (<i>spouse</i>)	\$
Doctors, dentists, chiropractors, acupuncture, therapy**	\$
Hospitals, ambulances**	\$
Prescription (not over the counter) drugs**	\$
Eye exam, glasses, contacts**	\$
Medical supplies/equipment**	\$
Hearing aids and batteries**	\$
Miles driven to and from doctors, hospitals, pharmacies	Miles

**Not paid through HSA or FSA

Interest

Investment interest (paid on loans to acquire investments)	\$
Real estate interest paid not listed on 1098s	\$

Taxes paid

Taxes paid on primary residence not listed on 1098s	\$
Taxes paid on vacation home not listed on 1098s	\$
Taxes paid on other real estate not listed on 1098s	\$
Vehicle registration tax (auto registration)	\$
Sales tax paid on major purchases: cars, boats, planes	\$

Contributions

Cash contributions each under \$5,000*	\$
Non-cash contributions total under \$500**	\$
Expenses incurred as a volunteer	\$
Miles driven as a volunteer	Miles

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

Employee business expenses not reimbursed by employer

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

** 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

Total miles driven during the year Miles

Miles driven for business (not commuting miles from home to work) Miles

Download other tax organizers

Please consider filling out other applicable tax organizers listed below

Tax organizers

[Business Income and Expenses Tax Organizer](#) (If you own a business)

[Rental Income and Expenses Tax Organizer](#) (If you own rentals)

[Simple Tax Organizer](#)

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Taxes solved.

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