

Schedule A Itemized Deductions

General Questions:	
Do you have more than \$24,000 in itemized expenses?	YES NO
Did you refinance your home this year?	YES NO
Did you buy or sell a home this year?	YES NO
NOTE: provide a copy of the settlement sheet for the above transactions	
<u>Medical and Dental Expense (greater than 7.5% of your gross income)</u>	
Prescription medications	
Health Insurance Premiums - Paid directly by you (not with employer)	
Health Insurance Premiums pretax on wages - not deductible here	
Qualified Long Term Care Premiums	
Self Employed Health Insurance Premiums	
Insurance Reimbursement	
Doctors /Dentist	
Hospitals, clinics, Lab and x ray fees	
Eyeglasses and contacts	
Medical equipment and supplies	
Miles driven for medical purposes	
Other medical and dental expenses:	
<u>Taxes (LIMITED TO \$10,000 and \$5,000 if MFS)</u>	
State Income Taxes withholdings - we will take from your W2	
State Income Taxes - paid directly	
Real Estate Taxes	
Excise Tax on Vehicles	
Sales Tax (only if you don't claim state taxes paid) IRS standard chart available	
<u>Interest - limited to first \$1M in mortgage</u>	
Home Mortgage Interest (provide statements)	
Points paid, Date of loan, life of loan (years)	
<u>Charitable Contributions: CASH/CHECK TOTAL - Write charity name and amount below:</u>	
***Must have receipt of payment from bank or credit card.	
*** Must have written receipt of donation from charity stating no goods or services were purchased for every transaction greater than \$250	
# Miles driven for charitable purposes and Parking Fees, tolls, and local trans.	
<u>Charitable Contributions: NON CASH TOTAL</u>	
**** Items donated must be in good used condition or better.	
If you have more than \$500 - you will need to provide details on donation and note you will have additional tax prep fees at our office hourly rates.	
<u>Miscellaneous Itemized Deductions: (2% limitation)</u>	
NOT DEDUCTIBLE STARTING WITH 2018 TAX RETURN	

Prepared for you by ACT CPA

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We are here to make your life less taxing!

Please call 508-230-8756
with any questions.