

# Schedule A Itemized Deductions

<b>General Questions:</b>	
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	
<b><u>Medical and Dental Expense (greater than 7.5% of your gross income)</u></b>	
Prescription medications	
<b>Health Insurance Premiums - Paid directly by you (not with employer)</b>	
<b>Health Insurance Premiums pretax on wages - not deductible here</b>	
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:	
<b><u>Taxes (LIMITED TO \$10,000 and \$5,000 if MFS)</u></b>	
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	
<b><u>Interest</u></b>	
Home Mortgage Interest (provide statements)	
Points paid, Date of loan, life of loan (years)	
<b><u>Charitable Contributions: CASH/CHECK TOTAL - Write charity name and amount below:</u></b>	
<b>*** Must have written receipt of donation either a bank record and letter from donee.</b>	
<b># Miles driven for charitable purposes and Parking Fees, tolls, and local trans.</b>	
<b><u>Charitable Contributions: NON CASH TOTAL</u></b>	
<b>**** Items donated must be in good used condition or better.</b>	
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.	
<b><u>Miscellaneous Itemized Deductions: (2% limitation)</u></b>	
NOT DEDUCTIBLE STARTING WITH 2018 TAX RETURN	