

TAX YEAR 2023

TAXPAYER NAME _____

MEDICAL

(Do not include amounts reimbursed by insurance.)

Medicare Premiums Paid..... \$ _____
 Other Health, Dental & Cancer Insurance..... \$ _____
 Long Term Care Insurance Premiums Paid..... \$ _____
 Medical Miles
 (# of miles - do not calculate \$ amount) _____
 Prescription Drugs..... \$ _____
 Doctors, Dentists, Hospitals..... \$ _____
 Glasses, Contacts, Hearing Aids & Supplies \$ _____
 Lodging..... \$ _____
 Other (itemize)..... \$ _____

TAXES

Real Estate..... \$ _____
 Tax on Vehicle Tags..... \$ _____
 Sales Tax on Motor Vehicles, Boats, & Building Materials..... \$ _____

ESTIMATED TAXES PAID

Date Paid	Federal \$	State \$

INTEREST

Bring all Form 1098s OR Complete this section

Home Mortgages (1st & 2nd Homes)
 Home Equity Line..... \$ _____
 Vendors Lien..... \$ _____
 Paid To _____
 Address _____
 Student Loan Interest Paid..... \$ _____

CONTRIBUTIONS

Cash or Check Donations. \$ _____
 Items or Property donated (less than \$500).. \$ _____
 If over \$500 donated - you must bring supporting documents
 Charitable Miles
 (# of miles - do not calculate \$ amount)..... _____

OTHER DEDUCTIONS

Union & Professional Dues..... \$ _____
 Professional Publications..... \$ _____
 Uniforms, Safety Shoes & Equipment, Etc..... \$ _____
 Teaching Supplies..... \$ _____
 Job Hunting Expense..... \$ _____
 Job Related Education..... \$ _____
 Safe Deposit Box..... \$ _____
 Investment Expenses..... \$ _____
 Tax Preparation & Consultation..... \$ _____
 Alimony Paid..... \$ _____
 IRA (Traditional) - Taxpayer..... \$ _____
 IRA (Roth) - Taxpayer..... \$ _____
 IRA (Traditional) - Spouse..... \$ _____
 IRA (Roth) - Spouse..... \$ _____

CHILD CARE EXPENSES

List provider names, addresses, federal identification numbers and amount paid on separate page.
YOU MUST HAVE PROVIDER'S ID # TO FILE!

OTHER ITEMS

ATTACH ALL SUPPORTING DOCUMENTS & DETAILS FOR THE FOLLOWING ITEMS:

- _____ Employee Business Expense
- _____ Casualty or Theft Loss
- _____ Moving Expenses **(Military ONLY)**

Tax Credit or Deduction for College Tuition & Fees

If you plan to claim a college tuition tax credit or deduction for yourself, your spouse, or dependent(s), you must bring all Form 1098-Ts from all colleges and universities attended, AND any documents regarding PACT Plans or IRA withdrawals for education purposes.