

# Itemized Deductions Worksheet

In order to itemize your deductions each year, the total must exceed the standard deduction for your filing status.

**Medical Expenses.** Must exceed 10% of income to be a benefit—include cost for dependents—do not include any expenses that were reimbursed by insurance. (paid with personal cards/checks)

Dentists	\$	Hospitals	\$
Doctors	\$	Prescriptions	\$
Equipment (details) \$		Eyeglasses (RX)	\$
Insurance (not through employer)			\$

Medical miles: \_\_\_\_\_

**Taxes Paid.** Personal Residence or Vacation home only, not any rental or business use.

State estimated taxes—paid during the year	\$
Real estate tax—residence	\$
Real estate tax—other	\$
Personal property taxes (not typically in Texas)	\$
Real Estate property tax refund	\$ ( )
Foreign tax paid	\$
Other	\$
Other	\$
Other	\$
Balance paid for state and local taxes for prior years returns (do not include interest or penalties)	\$
Did you keep receipts for sales tax paid?	Yes No
Did you purchase a car, plane, boat, or home?	Yes No
Provide copy of purchase documents.	

**Interest Paid.** Do not include interest paid for full or partial business or rental-use property, including business use of the home. Provide all Forms 1098 or lender information and ID numbers.

Mortgage Company:	Main Home / Vacation / Other
Mortgage Company:	Main Home / Vacation / Other
Mortgage Company:	Main Home / Vacation / Other

Did you refinance any homes this year? If so, please provide closing documents.

**Charitable Contributions.** If over \$500 in noncash charitable contributions (i.e Goodwill) complete the charity worksheet.

Cash/checks/credit cards (please provide letters from charities)	\$
Noncash contributions (FMV). Clothing or household items must be in good used condition or better.	\$
Did you transfer funds from an IRA directly to a charity? Yes No	\$
Did you donate appreciated property to a charitable organization? Yes No	
Charitable mileage	

## Casualty and Theft Losses

If you suffered any sudden, unexpected damage or loss of property, or a theft in a federally-declared disaster area, provide details to your tax preparer. Yes No

**Miscellaneous Itemized Deductions.** Miscellaneous itemized deductions subject to the 2% AGI limitation are no longer deductible on the federal return. These expenses may be allowed on various states returns if you work in a state that requires a state income tax return.

## Gambling losses.

Gambling losses are deductible only up to the amount of gambling winnings reported.

Please provide all W2G's for gambling winnings

Provide the win/loss report from all casinos

Provide all itemized logs of transactions if not included in the casinos win/loss reports

# Other Deductions or Questions

- Notes:**
- Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses.
  - Expenses to enable individuals, who are physically or mentally impaired, to work are generally deductible.

# Itemized documents checklist

Completed itemized deductions worksheet

All Form 1098's for Mortgage interest for each personal residence or vacation home

Refinance or HELOCs documents

Tax receipts for each home, if not included on the Form 1098 or paid directly. If paid directly, you can only deduct payments actually made during the return calendar year (Jan - Dec) eventhough the County may have a January due date.

Charitable acknowledgement letters for donations of \$250 or more

Charitable worksheet for noncash donations of \$500 or more (such as donations to Goodwill, Salavation Army, etc)

Any other supporting documents that may be applicable