

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, purchase or sale

Fill in any of the following that apply to you.

Medical expenses

Only list expenses paid from personal funds, not through employer, social security or HSA/FSA.

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

Interest

Investment interest (paid on loans to acquire investments)	\$
Real estate interest paid not listed on 1098s (max 2 properties)	\$

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*

Monetary contributions	\$
Property contributions	\$
Expenses incurred as a volunteer	\$
Miles driven as a volunteer	Miles

**All contributions in any amount must be documented with a letter from the charitable organization. This letter must state that no goods or services were received in exchange for the contribution.*