

# 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

Fill in any of the following that apply to you.

## Medical expenses

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

\*\*Not paid through HSA or FSA

## Interest

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

## 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

Cash contributions each under \$5,000*	\$
Non-cash contributions total under \$500**	\$
Expenses incurred as a volunteer	\$
Miles driven as a volunteer	Miles

\* Cash contributions each over \$5,000; provide a list of what was donated, when and to what organization.

\*\* Non-cash contributions total over \$500; please provide list of what was donated, when and to what organization.