

**WHEN SHOULD I ITEMIZE?**

Normally if you are buying your home and paying a mortgage interest, that is a key that itemizing could help you.

Enclosed is a list to assist you in what is deductible.  
is deductible. **If you are unsure if something is deductible, please bring all documentation and ask.**

**ITEMIZED DEDUCTION ITEM LIST**

**MEDICAL EXPENSES**

Medical & Dental Ins	_____	Ambulance	_____
Amount paid to Doctor & Dentist	_____	Hospital Care	_____
	_____	Nursing Help	_____
	_____	X-Rays	_____
Prescriptions	_____	Lab Work	_____
Insulin	_____	Hearing Aids & Etc	_____
Alcohol & Drug Rehab	_____	Eye Exams & Glasses	_____
Prescribed Med Equip	_____	Contacts & Supplies	_____
Other	_____		
Medical Miles Traveled	_____		
Lodging While Obtaining Medical Treatment	_____		

**TAXES**

Real Estate Taxes	_____	Tax on Auto Tags	_____
Sales Taxes	_____		

**INTEREST PAID**

Mortgage Interest	_____	Please Provide all Forms 1098	
Refinance? Points?	_____	PMI	_____

**CHARITABLE GIFTS**

Church	_____
Non-Profit Organizations	_____
Fair Market Value of Items given to Charities	_____
***If over \$500 in total, provide documentation***	_____
Miles Driven for Charitable/Non-Profit Organizations	_____

**MISCELLANEOUS**

Union Dues/Professional Fees	_____
Tools/Supplies Purchased for Job	_____
Safety Equipment used on Job	_____
Required Uniforms	_____
Last year Tax Prep Fees	_____
Safe Deposit Box	_____
Employment Required Schooling that you paid for	_____

**OTHER ITEMS TO CONSIDER**

IRA Contributions	Child Day Care Expenses
Education Expenses	Did you buy or sell a house?
Student Loan Interest	Did you have any self-employment income?
Did you have a Casualty/Disaster Loss	

**PLEASE COMPLETE THIS FORM AND BRING IT BACK WITH YOU WHEN WE COMPLETE YOUR TAX RETURN**