

PERSONAL DEDUCTIONS – 2023

MEDICAL

PRESCRIPTIONS _____		DOCTORS _____
INSULIN _____		DENTISTS _____
MEDICAL INSURANCE _____ *		CHIRO _____
LONG TERM CARE PREMIUMS _____		THERAPY _____
MEDICAL REIMBURSEMENT _____ **		LAB FEES _____
EYEGLASSES/CONTACTS _____		HOSPITALS _____
HEARING AIDS _____		PARKING _____
MILES DRIVEN <i>(TO DRS.)</i> _____		LODGING _____
OTHER MEDICAL /EQUIP _____		_____

PLEASE PROVIDE ALL HEALTH INSURANCE POLICY NUMBERS AND 1095-A/B/C & CA F-3895 FORMS

****Includes Flexible Spending Account Reimbursements and Health Savings Account (HSA) Distributions****

TAXES

STATE INCOME TAX <i>(OTHER THAN WITHHOLDING FROM W-2'S)</i>		
STATE ESTIMATE <i>(4TH QUARTER FOR 2023, PAID IN 2024)</i>		_____
2023 STATE EXTENSION PAYMENT PAID IN 2024		_____
REAL ESTATE TAXES - PERSONAL RESIDENCE		_____
	SECOND PERSONAL RESIDENCE	_____
	LAND	_____
PERSONAL PROPERTY TAXES -	BOAT	_____
	MOBILE HOME	_____
	OTHER	_____
DMV FEES - VEHICLE LICENSE ONLY <i>(autos, trucks, boats, motorcycles, etc)</i>		_____

INTEREST EXPENSE provide interest paid and ending loan balances **INTEREST PAID** **PRINCIPAL BALANCE**

HOME MORTGAGE - PERSONAL RESIDENCE <i>(PROVIDE FORM 1098)</i>		
2ND MORTGAGE	_____	_____
IF PAID TO INDIVIDUAL:		
NAME _____		
ADDRESS _____		
SSN# _____		
SECOND PERSONAL RESIDENCE <i>(PROVIDE FORM 1098)</i>		
2ND MORTGAGE	_____	_____
<i>(INCLUDES MOTORHOMES, TRAILERS & SELF-CONTAINED BOATS)</i>		
IF PAID TO INDIVIDUAL:		
NAME _____		
ADDRESS _____		
SSN# _____		

ARE ALL LOANS / MORTGAGES SECURED BY THE PROPERTY? _____

HAS YOUR MORTGAGE BALANCE BEEN REDUCED THROUGH NEGOTIATION WITH THE LENDER? _____

ARE THESE ORIGINAL PURCHASE LOANS OR HAVE YOU REFINANCED AT ANY TIME? _____

(IF YOU HAVE PURCHASED A NEW HOME OR REFINANCED YOUR EXISTING RESIDENCE THIS YEAR PLEASE PROVIDE YOUR ESCROW CLOSING STATEMENT)

INVESTMENT INTEREST -	LAND	
	BROKERAGE ACCOUNTS <i>(MARGIN)</i>	_____
	OTHER	_____

SEE PERSONAL WORKSHEET FOR STUDENT LOAN INTEREST EXPENSE

CONTRIBUTIONS (in 2023 ALL DONATIONS must be substantiated by a receipt or cancelled check. NO CONTRIBUTIONS OF CASH WITHOUT SUBSTANTIATION CAN BE CLAIMED ON THE TAX RETURN)

CHURCH	_____	CANCER FUND	_____
HEART ASSOCIATION	_____	UNITED WAY	_____
PAYROLL DEDUCTION	_____	RED CROSS	_____
NONCASH – GOODWILL	_____	SCOUTS	_____
SALVATION ARMY	_____	MILEAGE	_____
VOLUNTEER EXPENSES	_____	OTHER	_____
HURRICANE / FIRE RELIEF	_____	OTHER	_____

Political or PAC Contributions are NOT Deductible

IRS regulations require substantiation from the charitable organization for any one-time contribution of \$250 or more, canceled checks do not qualify. If you have donated a car this year, please provide all paperwork from the charity. Also, like groups of non-cash items donated (including crypto currency) with a fair market value of over \$5,000 REQUIRE an appraisal. All non-cash items require a receipt with an itemized description and estimate of fair market value (FMV).

MISCELLANEOUS EMPLOYEE BUSINESS EXPENSES:

(Do not include deductions from other worksheets in this section. This section is reserved for expenses incurred as an employee that are not reimbursed by your employer or said reimbursement is included as compensation on your W-2.)

*****NO LONGER DEDUCTIBLE ON FEDERAL RETURN AS EMPLOYEE** STILL DEDUCTIBLE ON STATE*****
ARE THESE EXPENSES ORDINARY AND NECESSARY TO YOUR JOB / PROFESSION? _____

CELL PHONE EQUIPMENT	_____	PROFESSIONAL PUBS	_____
CLEANING – (uniforms)	_____	OFFICE EQUIPMENT	_____
COMPUTER FEES/Internet	_____	OFFICE SUPPLIES	_____
EDUCATION EXPENSE	_____	RESUMES	_____
EMPLOYMENT AGENT FEE	_____	SAFE DEPOSIT BOX	_____
EQUIPMENT	_____	SMALL TOOLS	_____
GAMBLING LOSSES**	_____	SOFTWARE	_____
GIFTS	_____	TELEPHONE - CELL	_____
JOB SEARCH EXPENSES	_____	WEBSITE	_____
LEGAL FEES*	_____	UNIFORMS	_____
LICENSE FEES	_____	UNION DUES/Association	_____
MEALS	_____	TAX PREP/CONSULTATION	_____
PROFESSIONAL DUES	_____	ONLINE STREAMING SUBs	_____
POSTAGE (BUSINESS)	_____		_____

**For tax year 2023, if you pay legal fees over \$600, you will be required to file a F-1099 to person(s) or firm paid.*

***Gambling Losses allowed to the extent of winnings - Keep records such as (books, player card statements etc.)*

INVESTMENT EXPENSES: NO LONGER DEDUCTIBLE ON FEDERAL RETURNS

(Still deductible on State)

IRA CUSTODIAL FEES	_____	MEALS	_____
KEOGH CUSTODIAL FEES	_____	TRAVEL	_____
SEP-IRA FEES	_____	LODGING	_____
INVESTMENT PUBLICATIONS	_____	MAINTENANCE	_____
INVESTMENT ADVISORY FEES	_____		_____
(SEE BROKER'S STATEMENTS)			

MISCELLANEOUS QUESTIONS YOU MAY HAVE OR ADDITIONAL INFORMATION:

SOME OF YOU MAY NEED ADDITIONAL WORKSHEETS. PLEASE CONTACT US IF YOU NEED ANY OF THE FOLLOWING AND WE WILL BE MORE THAN HAPPY TO SEND THEM TO YOU OR FEEL FREE TO DOWNLOAD THEM FROM OUR WEBSITE.

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| BUSINESS WORKSHEET | RENTAL WORKSHEET |
| FARM WORKSHEET | HORSE BREEDING/SHOW WORKSHEET |
| AUTO EXPENSE WORKSHEET | OFFICE IN THE HOME WORKSHEET |
| MOVING EXPENSE WORKSHEET | CASUALTY LOSS WORKSHEET |
| PROFESSIONAL WORKSHEETS: ENTERTAINER, MEDICAL/HEALTH, FIREMAN, TEACHER, POLICE | |