

ITEMIZED DEDUCTIONS CHECKLIST (PAID IN 2024)

Medical Expenses: HSA/FSA plan? Y N

Prescription Drugs \$ _____
 Health Ins. Premiums \$ _____
 Medicare Premiums \$ _____
 Dental Ins. Premiums \$ _____
 Long-Term Care Ins. \$ _____
 Doctors & Dentists \$ _____
 Counseling \$ _____
 Physical Therapy \$ _____
 Other: \$ _____
 Hospital & Skilled Nursing \$ _____
 Convalescent & L-T Care \$ _____
 Medical Lodging \$ _____
 Medical Mileage _____ mi.
 Lab & X-ray \$ _____
 Glasses/Hearing Aids \$ _____
 Insurance Reimbursement \$ _____

Taxes:

Real Estate: Residence \$ _____
 2nd/Vacation Home \$ _____
 Investment Prop. \$ _____
 Sales Tax on large purchases \$ _____
 Personal Property Tax \$ _____
 2023 State Taxes (pd '24) \$ _____
 Auto DMV Fees \$ _____
 Auto DMV Fees \$ _____
 Other DMV Fees \$ _____

2024 Est. Taxes Paid:

1st qtr. Fed _____ CA _____ Date _____
 2nd qtr. Fed _____ CA _____ Date _____
 3rd qtr. Fed _____ CA _____ Date _____
 4th qtr. Fed _____ CA _____ Date _____

Interest

Prin. Residence Mtg.* \$ _____
 2nd/Vacation Hm. Mtg.* \$ _____
 Home Equity Loan* \$ _____
 Investment Loans \$ _____
 Educational Interest \$ _____
 Points \$ _____
 PMI – Mortgage Insurance \$ _____

* If paid to individuals, list:

Name
 Address

 SSN

Contributions:

(starting 8-17-07 cash contributions must be receipted)

House of Worship \$ _____
 \$ _____
 \$ _____
 \$ _____
 \$ _____
 Volunteer expenses \$ _____
 Goods \$ _____
 Goods \$ _____
 Charity mileage _____ mi.
 Other: \$ _____

Employee Business Expenses:

Union Dues \$ _____
 Educational Expense \$ _____
 Job Seeking Costs \$ _____
 Professional Licenses \$ _____
 Trade/Prof. Journals \$ _____
 Safety Equipment \$ _____
 Work Tools \$ _____
 Business Telephone \$ _____
 Uniform Cost/Laundry \$ _____
 Prof. Societies \$ _____
 Teacher Expenses..... \$ _____
 Business Mileage 2024 _____ mi.
 Total Car Mileage during 2024 _____ mi.

Miscellaneous Expenses:

Alimony Payment* \$ _____
 IRA Deposits (Trad/Roth) \$ _____
 SEP Deposits \$ _____
 Keogh Deposits \$ _____
 Safe Deposit Box \$ _____
 Tax Prep. Fees \$ _____
 Investment Expense \$ _____
 Legal Expenses re: Income \$ _____
 Childcare Expenses* \$ _____
 College Ed. Costs \$ _____

***Alimony/Child Care Information:**

Name
 Address

 SSN/Fed. ID No