

ITEMIZED DEDUCTIONS CHECKLIST (PAID IN 2022)

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 \$ _____

2021 State Taxes (pd '22) \$ _____

Auto DMV Fees \$ _____

Auto DMV Fees \$ _____

Other DMV Fees \$ _____

2022 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 Jan-June 2022 _____ mi.

Business Mileage July-Dec 2022 _____ mi.

Total Car Mileage during 2022 _____ 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 \$ _____

Child Care Expenses* \$ _____

College Ed. Costs \$ _____

***Alimony/Child Care Information:**

Name

Address

.....

SSN/Fed. ID No