

PERSONAL DEDUCTIONS – 2024

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 2024, PAID IN 2025)</i>	_____
2024 STATE EXTENSION PAYMENT PAID IN 2025	_____
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? YES _____ NO _____

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 2024 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 2024, 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.

- | | |
|--|-------------------------------|
| 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 | |