

PERSONAL DEDUCTIONS

The following is a list of the current personal deductions and credits available to individuals. If you do not see an expense listed here, it is probably not deductible. If you have any questions, or concerns about your expenses, please list them on the last page.

MEDICAL/DENTAL/VISION/RX

Miles traveled for medical expenses (you can claim .19 cents per mile) _____

Medical travel expenses (if required for medical services) _____

Total cost of insurance coverage for the year (do not include pre-tax insurance paid through payroll deduction) _____

Doctors/Dentists/Orthodontists _____

Prescription Medicine and any supplements, etc that your doctor has written you a prescription for such as insulin syringes, test strips, etc. _____

Hospital/Emergency Room _____ Lab fees _____ Physical Therapy _____

Vision (eyeglasses, contacts, contact solutions, Lasik and other eye surgery) _____

Medical equipment (crutches, wheelchairs, breathing machines, etc.) _____

Improvements to home for medical reasons (ramps, bathroom modifications, etc.) _____

*Please list only amounts that were actually paid or charged to a credit card that were in excess of any reimbursement received from an HSA or MSA.

TAXES

The law allows you to claim STATE (NOT FEDERAL) income taxes withheld from your pay, estimated state income taxes paid or back state taxes you paid this year for prior years. The amount withheld from your wages will be shown on your W-2 Form. It does not need to be listed here.

Estimated State Taxes Paid _____ State _____

Back State Taxes Paid _____

Sales tax paid on new vehicles _____

Sales tax paid on all other purchases (if you did not keep track, this will be calculated based on your income and the number of exemptions claimed). _____

NOTE: The law allows you to claim income taxes *OR* sales taxes paid for the year

Vehicle License/Lieu Tax (found on your registration paperwork) for all vehicles _____
Do Not include Emissions testing or any other fees).

New vehicle lieu tax paid when vehicle purchased (see purchase documents) _____

Registration fees paid on trailers, motorcycles, RV's _____

NOTE: Dog licenses, hunting/fishing licenses, marriage licenses, passport fees, etc. are NOT tax deductible.

Real estate (property) taxes primary home _____

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Real estate taxes (property) taxes second home/timeshare_____

Real estate (property) taxes paid on land_____

MORTGAGE INTEREST PAID

Mortgage Interest (Please provide Form(s) 1098) if available. If you paid an individual, please provide his/her name, address, and SSN.

Paid on your PRIMARY RESIDENCE (NOT your rental or other property)_____

Paid on second residence (including motor homes or boats, if there is a toilet bolted to the floor)

Paid on Home Equity Line of Credit/Second mortgage_____

Mortgage Insurance (not casualty insurance)_____

CHARITY DONATIONS

The IRS tracks donations in two categories. Cash and Check Donations and "Other than Cash and Check Donations." No matter which category, you must have a receipt for every donation.

If you give more than \$250 to any one single charity, such as a church, school, etc. you must also have a letter from that IRC section 501(c)(3) charity showing the dates and amounts of your donations. The letter must also state that no goods or services were given in exchange for the donation.

Cash and Checks donations – please list name of charity and total given for the year on a separate sheet of paper.

Name of Charity

Amount Donated

NOTE: You can claim mileage driven for charitable organizations, such as volunteering at church or sports teams. The deduction is .14 cents per mile. Number of Charity mileage driven _____

Non-Cash donations

Clothing, Furniture, Household items, etc.. You may also include the cost of supplies and items purchased for a charity such as supplies for teaching Sunday school, or coaching Little League. Please note: If the value of your donation is greater than \$5,000, you must have an appraisal for the donation in order to claim it on your tax return.

Please list the following information:

Date of Donation

Name & Address of Charity

Items donated

Value

NOTE: If you have receipts from the Charity, such as Goodwill or Salvation Army, you may write the above information on the receipts and provide us with a copy.

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EMPLOYEE WORK EXPENSES

These are expenses incurred as an employee (not a self-employed person) that are required to do your job and not reimbursed by your employer. Please keep a copy of your employer's policy for expenses and reimbursement.

Please make a separate worksheet for each spouse.

Occupation: _____

Un-reimbursed work required mileage (NOT COMMUTING BACK AND FORTH TO WORK) can be claimed at .54 cents per mile for 2016 –OR- actual expenses. Please see Auto Expense worksheet.

Truck drivers can claim an increased per diem allowance for the number of days on the road based on travel logs. Number of days out of town _____

Business required Travel Expenses:

Airfare _____ Lodging _____ Rental Car/Taxi _____

Per Diem – please dates and places worked out of town on a separate sheet of paper.

Meals and entertainment/tips _____

Please list the amount of total reimbursement received from employer for:

Travel: _____ Lodging _____ Meals _____

Gifts (you can only claim \$25 per person per year for gifts) _____

Cell phone service and cost of new cell phone and equipment _____

Internet _____ Telephone/Fax line _____

Computer, laptop, printer, fax machine, etc. _____

Office supplies, postage, ink cartridges, etc. _____

Office-in-home expenses – please see separate worksheet

Uniforms, boots, shoes, safety equipment _____

Dry Cleaning/Cleaning at home (at cost) _____

Union and professional dues, fees, memberships _____

Business cards, website, advertising _____

Research books, journals, magazines, publications _____

Tools and equipment _____

Job Education/Training/Seminars _____

Job search expenses _____

Licensing, finger printing, drug tests, physicals _____

Other work related expenses _____

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INVESTMENT EXPENSES

Safe deposit box/Safe _____

Investment related magazines/newspapers _____

Investment account fees _____

Legal fees _____

Tax Preparation fees _____

OTHER EXPENSES AND CREDITS

Alimony paid for the year, please list:

| Name of person paid | SSN of person paid | Amount Paid for the Year |
|---------------------|--------------------|--------------------------|
| _____ | _____ | _____ |

Casualty/Theft losses – please list on separate worksheet the date of each casualty/theft, amount of insurance reimbursement, if any, and amount of loss.

If you are a school teacher for grades K-12, you may claim up to \$250 of expenses paid out of your own pocket. Amount spent _____

Moving Expenses – to deduct moving expenses, your move must be over 50 miles away from your old home/job.

Number of miles moved _____

Number of miles from your old home to your old job _____

Cost of moving your household/vehicles (U-haul rental, gas, moving service, etc) _____

Cost of airfare _____ Cost of lodging (no meals) _____

Cost of temporary storage (30 days) _____ Cost of deposits _____

Traditional IRA/SEP/SIMPLE retirement contributions (Please do not include ROTH or payroll deductions). The maximum contribution for 2016 is \$5,500 per person (\$6,500 if 50 or older). You may contribute to a non-working spouse's IRA. You must have taxable wages in order to deduct your contribution.

Taxpayer _____ Spouse _____

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Residential Energy Credits – You may claim a credit on the following items that are added to your home for energy savings:

Solar Energy, Geothermal and Wind equipment and installation cost _____
The equipment has to be considered owned by you. This credit is continuing through 2017. The credit reduces tax but is NOT refundable. It can be carried forward if not used.

Cost of windows (do not include installation) _____

Exterior doors (do not include installation) _____

Cost of heaters, heat pumps, air conditioners, fans (do not include installation) _____

Cost of insulation, window screens, window coatings that block sun rays _____

This credit is phasing out this year. The maximum credit is \$500 and it is accumulated over the lifetime of your home. Energy Efficient Appliances do not qualify for this credit.

Adoption expenses _____

National Guard/Reservist expenses:

Mileage traveled out of town for training _____

Uniforms, boots, equipment, required supplies _____

Gambling Losses – you may claim your gambling losses only up to your gambling winnings

Winnings _____ Losses _____

College tuition, books and fees

You may claim the actual cost of tuition and required books. Sometimes your college will give you a form 1098-T for tuition. Please check this form against your actual records for tuition, required fees and books expense for the year. Often times these forms are wrong. Also, you must have either taken out a student loan to pay the expense or paid cash/check or credit card. If you received a scholarship that amount must be subtracted from your actual costs. You cannot claim meals/board, or living expenses such as dorm rent. You can claim a college tuition credit for yourself, your spouse and your dependents only. You cannot claim the credit if the person is NOT your dependent.

American Opportunity Credit – this credit can only be claimed for the first FOUR years of college education. If this credit has already been claimed, please list information under the Lifetime Learning Credit section.

Name of Student: _____
SSN _____

Year in College (freshman, sophomore, Junior, Senior)

Name and Address of College _____
Employer's Identification Number for College _____

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Tuition actually paid this year (do not include tuition/books paid by scholarship)_____

Books and other course required materials_____

Computer, Laptop, Printer and other required supplies_____

Internet (if required for college classes)

Lifetime Learning Credit is available to students who are pursuing a Master's degree or higher, or students that have claimed four years of American Opportunity Credit.

Name of Student: _____

SSN _____

Year in College (Year 5, Master degree, Doctorate degree)

Name of College_____

Address_____

Employer's Identification Number for College_____

Tuition paid this year_____

Books and other course related materials_____

Computer, Laptop, Printer and other required supplies_____

Internet (if required for college classes)

Student loan interest paid: taxpayer_____ spouse_____

NOTE: Private school fees, uniforms, etc and home school fees, etc are NOT tax deductible.

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Child/Dependent Care and Respite Care

Please list the following information. You must have all of this information in order to claim the credit. If you claim the credit, then the person you paid must claim the income you paid to them for child care. If a child is cared for you can only claim expenses paid for children under 13. If you are paying for a dependent that has special needs, there is no age limit. The maximum credit is based on \$3,000 for one dependent and \$6,000 for two or more dependents.

The following information is required to be shown on your return:

Name of Child Care Provider _____

Address _____

Employer's Identification Number (EIN) or Social Security Number _____

Name of person cared for _____

Amount paid for that person _____

Name of person cared for _____

Amount paid for that person _____

Name of person cared for _____

Amount paid for that person _____

QUESTIONS/CONCERNS

Please list any expenses that you have questions about that are not shown above.

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