

Deduction Information Worksheet

2025

Must Be Filled Out As Completely As Possible (use your 2024 return as a guide)

MEDICAL (Must exceed 7.5% of Adjusted Gross Income)

(Enter amounts not reimbursed by insurance.) Prescription Drugs and Medicines... Doctors, Dentists, Psych. & Practitioners... Hospitals & Nursing Homes... Total Hospital/Medical/Dental/Medi-Care insurance paid out of pocket (DO NOT include payroll withholdings, life, accident or auto insurance,)... Medical Insurance for a dependent... Long-Term care insurance premiums... Medicare insurance premiums... Miles traveled for medical care... Parking fees... Lab & X-Ray fees... Glasses, Hearing Aids, Contact Lenses... Other (Nurses, Ambulance, Shoes, etc.)... Handicapped People - Home improvements...

\*TAXES

(DO NOT INCLUDE WITHHOLDING FROM PAYCHECKS) Prior year's (2025) state 4th qtr. est. paid in Jan 2026... Ext. to file payment on 2024's state return paid in 2025... Balance due on 2024's state return paid in 2025... Payment on a prior year's state return or adjustment... Real Estate Property taxes: 1st & 2nd Home & Vacant land (DO NOT include rental property taxes) \$ All Auto & Vehicle license registration fees paid in 2025... Boat or plane personal property taxes... Sales Tax: Vehicle \$ Boat \$

\*\*\*HOME MORTGAGE INTEREST PAID (Not for Rental or vacant Land)

Personal Residence, Condominium, Co-op, Motor Home, Mobile Home, Boat, (Must be self-contained.) Primary Residence Old/New Secondary Home HOME MORTGAGE INTEREST PAID: To an Institution: 1st(\*) \$ 2nd(\*) \$ Points (Buyer or Seller) \$ To an Individual: (\$50 penalty for no SS #) \$ Indiv. Name: SS# Address:

(\*) Amounts should agree with Form 1098. If the amounts shown DO NOT coincide with Form 1098 issued by the mortgage holder, check here If Form 1098 was issued in another's SS#, enter that person's name and SS#. Name: SS#

It is mandatory to bring copies of the closing statements/escrow papers for the purchase/refinance/new loan.

If mortgage balance exceeds \$1,000,000 pre 2018, \$750,000 post 2017 Interest deduction is limited.

EDUCATION INTEREST PAID

Please call office for worksheet if you need one. Bring in form 1098E.

INVESTMENT INTEREST PAID

Interest paid for investments, such as vacant land, stocks, etc., receive special treatment. Do not include amounts used to acquire tax exempt investments. Please list below:

Table with 4 columns: Paid To, Amount, Paid To, Amount

\*\*\*NON-BUSINESS CASUALTY LOSSES

(Must exceed 10% of Gross Income to be deductible. Federal/State declared disaster area).

Loss: Auto Fire Theft Storm \$ Paid by insurance company \$

PLEASE BRING IN POLICE REPORT - INSURANCE PAPERS.

AREA DECLARED FEDERAL/STATE DISASTER AREA: YES NO

ESTIMATED TAX PAYMENTS

(DO NOT INCLUDE W-2 WITHHOLDING) (Bring your cancelled checks) Payments for 2025 estimates only. Do not list \$ paid on 4/15/2025 for 2024 tax due or payment sent in with 2024 extension.

Table with 5 columns: Date Due, Date Paid, Federal, Date Paid, State. Rows include Applied From Prior Year's Refund, 1st Quarter, 2nd Quarter, 3rd Quarter, 4th Quarter.

NANNY TAX - Call office for Details

CONTRIBUTIONS

\*Volunteer services - Out of pocket expenses... Miles driven for charity... \*House of worship... Payroll deduction... \*\*Used clothing & furniture... \*Cash donations w/receipts (see below)...

\*If a contribution is over \$1 in cash, a separate receipt is required, unless included in annual statement from your house of worship. Other acceptable records are canceled checks and bank statements.

\*\*If fair market value over \$500, need detailed summary of item(s), date given, original cost and fair market value at time of gift, receipt from charity (Mandatory), items must be in good condition. Contact office for a worksheet.

\*\*\*MISCELLANEOUS DEDUCTIONS (Not included on other worksheets

e.g.: Business, Teacher, Nurse, Police, Fireman) Must exceed 2% of AGI Union and professional dues... Tax return preparation/consulting fees... Safe deposit box... Educational expense (job related) call office for worksheet... Professional License Fees... Professional publications/supplies... Safety equipment... Small tools... Telephone - non-reimbursed business calls... (not a percentage of base monthly rate) Uniforms/Laundry required by employer... Business use of auto - miles... Employee non-reimbursed expense... Meals \$ Travel \$ Lodging \$ Computer: Hardware \$ Software \$ Internet \$ Professional/technical societies... Job search (same occupation) auto - miles... Employment agency fees/resumes... Jury duty fees reimbursed to employer... Legal fees (must be tax or income related)... Military reserve (uniforms & training)... Mutual Fund fees... Investment expenses: Meals \$ Travel \$ Lodging \$ IRA custodial fee if paid by check... Gambling/Lottery losses,(if you have W-2G Form)...

OTHER INFORMATION OR QUESTIONS

Blank lines for other information or questions.

\*\*\*These deductions are no longer deductible on the Federal tax return but may be deductible on the state return.