

Itemized Deductions

Medical and Dental Expenses: These are out-of-pocket expenses not reimbursed by insurance. To be deductible, medical & dental expenses must exceed 7 1/2% of your Adjusted Gross Income.

	Amount		Amount
Prescription Medicine and Drugs		Lodging	
Total Medical and Dental Insurance Premiums Paid		Doctors, Dentist, etc.	
Long-term Care Insurance Premiums Paid		Hospital Fees	
Long-term Care Expense		Lab Fees	
Miles Traveled for Medical Care		Eyeglasses and Contacts	

Taxes Paid:

Item	Amount
Real Estate Taxes Paid	
Personal Property Taxes Paid (Auto Excise Tax)	
State and Local Taxes Paid (Balance Due on Previous Year's State and Local Taxes that You Paid in this Current Year if applicable)	

Interest Paid:

Item	Amount
Home Mortgage Interest Paid to a Financial Institution (enclose form 1098)	
Deductible Points Paid for Obtaining a Mortgage	
Other Home Mortgage Interest Paid (Provide Name and Address of Recipient)	
Investment Interest Expense Paid	

Child & Dependent Care Expense:

Did you pay child or dependent care expenses in order to work, look for work or attend school full time? _____

Is your spouse employed or a full-time student? _____

Name of Child Care Provider	
Street Address	
City, State, ZIP	
Social Security # or Employer ID#	
Amount Incurred and Paid during Tax Year	
Name of Qualifying Child or Dependent	Social Security # of Child or Dependent

Itemized Deductions (cont.)

Charitable Contributions:

Caution: Only contributions made to a U.S., Canadian or Mexican IRS recognized organized charities are deductible. Canceled checks are not considered a receipt from a charitable organization. The law requires receipts for all charitable contributions.

Cash Contributions: (Cash or Check)

Name of Organization	Amount

Non-Cash Contributions:

Name of Organization	Amount

If the TOTAL of all noncash contributions is over \$500, please provide the following information.

	First Charity	Second Charity
Name of Donee Organization		
Address of Donee Organization		
Description of donated property		
Date property acquired by you		
Your Cost or Basis in property		
Date property was donated		
Fair Market Value at time of donation		

Miscellaneous Deductions:

Item	Amount
Gambling Losses (to the extent of reportable winnings)	

Flying Deductions:

If you live in CA, NY, please include your trips flown for the tax year period.

EDUCATION CREDITS

Information to Claim AOTC or Lifetime Learning Credits

American Opportunity Tax Credit

Student Name	Student SS#	Qualified Expenses	Year in School	Prior Years Credit Claimed

Lifetime Learning Credit

Student Name	Student SS#	Qualified Expenses

Note: You cannot take AOTC and the Lifetime Learning Credit for the same student.

For the AOTC and Lifetime Learning Credit, you may claim qualified expenses and fees for yourself, your spouse and/or your dependents. For AOTC your child must be enrolled at least half-time in the first four years of their undergraduate degree program. If you are married, you must file a joint return to receive either of these credits.

The IRS defines qualified expenses as the tuition and fees an individual is required to pay in order to be enrolled or attend an eligible institution.