



Non-Business Deductions

All Professions

△ Joint Filers: Except where noted, please combine your expenses on this worksheet.

Please round all amounts to the NEAREST \$1.00.

(For example, enter \$42 for a deduction of \$42.49. Enter \$43 for a deduction of \$42.50)

Name:

Tax Year:

Adjustments & Credits

IRA Contributions (not 401K / 403B, etc.)	Taxpayer: \$ <input type="checkbox"/> Traditional <input type="checkbox"/> Roth	Spouse: \$ <input type="checkbox"/> Traditional <input type="checkbox"/> Roth
Education Expenses	Tuition: Please provide Form(s) 1098-T Student Loan Interest: Please provide Form(s) 1098-E	529 Plan Contributions: \$
Child & Dependent Care Expenses (Both spouses must have worked and/or attended school.)	Third Party Provider: _____ Provider Address: _____ Child Name: _____	Provider EIN/SSN: _____ Expense: \$

Non-Business Itemized Deductions

Medical Expenses (see also Health Insurance Worksheet)	\$ _____ <i>Total unreimbursed cost of doctors, dentists, perscriptions, eyeglasses, medical equipment, etc.</i>
	Medical <u>Insurance</u> Premiums: \$ _____
Taxes & Interest Paid Provide 1098(s) for mortgage <u>interest</u> .	Real Estate Tax (If not on 1098): \$ _____ State Taxes: \$ _____ <i>Balances due paid with any state tax returns filed last year - <u>not</u> from W2s</i>
Charitable Donations	Monetary: \$ _____ *Non-monetary: \$ _____ <i>*Non-monetary means clothing, furniture, etc. @ resale value, not original value. \$500 limit on non-monetary donations: if higher, please provide receipts with donee name & address.</i>
Tax Extensions	Did you file an extension for this tax year? Yes <input type="checkbox"/> No <input type="checkbox"/> Did you make any payment(s) with the extension request(s)? If so, provide amount(s) paid: Federal \$ _____ State \$ _____

Quarterly Estimated Taxes Paid (Not from W2 withholding)

Federal			State Paid: _____		
	Date Paid	Amount		Date Paid	Amount
1st Quarter		\$	1st Quarter		\$
2nd Quarter		\$	2nd Quarter		\$
3rd Quarter		\$	3rd Quarter		\$
4th Quarter		\$	4th Quarter		\$