

Keep Track Of Your Expense Deductions

List amounts for items you have. Save receipts for your deductions.

Date:

Medical & Dental

DR:	\$
DR:	\$
DR:	\$
Operations:	\$
Prescription Drugs:	\$
Medical Insurance:	\$
Dental Insurance:	\$
Long-Term care insurance:	\$
Hospital/Emergency:	\$
Lab/X-Ray	\$
Visiting Nurses/in-home care	\$
Dental	\$
Dentures/Braces	\$
Glasses/Contact Lenses	\$
Hearing aids/Batteries	\$
Orthopedic Shoes	\$
Therapy Treatments	\$
Canes/Crutches/Braces	\$
Wheelchairs	\$
Bandages	\$
Medical Miles Driven	\$
Other	\$

Contributions

Place of worship	\$
College	\$
United way	\$
March of Dimes	\$
CFC	\$
Other	\$
Value of furniture or clothing given	\$

By signing below, you acknowledge that you have read this form, and that the data provided on the client data sheet on the opposite side is accurate to the best of your knowledge.

Taxpayer's Signature:

Taxes

Real estate tax	\$
Personal property tax	\$
State income tax	\$

Interest Paid

Home Mortgage Interest	\$
2nd Mortgage/Home equity	\$
Home Mortgage to individual	\$
Name:	
Address:	
Points paid at closing	\$
Investment Interest	\$

Casualty Losses

Accidents	\$
Fire accident	\$
Theft	\$
Natural Disasters	\$

Education Expenses

Student loan interest	\$
Post Secondary	\$
Tuition/Fees	\$
Required Course materials	\$

Volunteer work expenses

Place of worship	\$
Scouts/School	\$
Auto Miles Driven	\$

Spouse's Signature:

Miscellaneous/Employee Business expenses

Uniform Cleaning	\$
Work tools	\$
Union Dues	\$
Safety Shoes/Gloves	\$
Education expenses	\$
Employment/Job seeking fees	\$
Sales/Entertainment	\$
Professional certification	\$
License Renewal	\$
Professional Publications	\$
Business travel miles	\$
For work (Non-Commute)	\$
Miles driven to 2nd job	\$
tax Return preparation	\$
Safe deposit box	\$
Investment Expenses	\$

Self-Employed Business Expenses

Advertising	\$
Car&Truck expenses	\$
Total Business miles	\$
Legal&Professional Services	\$
Office Expenses	\$
Rent or lease payments	\$
Utilities&Maintenance	\$
Repairs&Maintenance	\$
Supplies	\$
Taxes & Licenses	\$
Travel	\$
Meals	\$
Professional Recertification	\$
License Renewal	\$
Professional Publications	\$
Credit Cards Fees	\$
Other	\$