

Special Deductions (complete items only if applicable)

Retirement Contributions

	<u>Husband</u>	<u>Wife</u>
IRA Deduction (\$5,500 maximum, or \$6,500 if age 50 or more)	\$ _____	\$ _____
Self-employed SEP, SIMPLE or qualified plans	\$ _____	\$ _____
Or, calculate maximum amount	_____	_____

Health Savings Account (Form 5498-SA) \$ _____

Student Loan Interest (Form 1098-E) \$ _____

Teacher/Educator Classroom Expenses (\$250 maximum) \$ _____

Qualified Higher Education Tuition & Fees \$ _____

Dependents Qualified Tuition & Fees (name & amount):	<u>Dependent</u>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Alimony Paid (recipients' name, social security number & amount):
 _____ SSN: _____ \$ _____

Penalty on Early Withdrawal of Savings \$ _____

Moving Expenses Related to a Job Change

Distance from old home to old job _____	From old home to new job _____
Amount paid to ship & store goods \$ _____	Transportation & lodging \$ _____

Credits (complete items only if applicable)

Child and Dependent Care

Provider name, address, social security or employer number & amount paid

1: _____	\$ _____
2: _____	\$ _____
3: _____	\$ _____
Total \$ _____	

Child name & amount paid (total for all children must equal total for all providers)

1: _____	\$ _____
2: _____	\$ _____
3: _____	\$ _____
Total \$ _____	

Adoption Credit

Child's name, social security number & date of birth: _____ Special Needs Foreign Disabled

List amounts:

	<u>Prior Year</u>	<u>Current Year</u>
Qualified expenses	\$ _____	\$ _____
Benefits received	\$ _____	\$ _____
Prior year credit	\$ _____	

Residential Energy Credits (include copies of receipts & certificates)

Address of property same as page 1 or: _____

List amounts:

Qualified insulation or material system \$ _____	Qualified circulation fan \$ _____
Qualified exterior windows \$ _____	Qualified solar electric property \$ _____
Qualified exterior doors \$ _____	Qualified solar water heater \$ _____
Qualified metal roof \$ _____	Qualified small wind energy property \$ _____
Qualified energy efficient building property \$ _____	Qualified geothermal pump \$ _____
Qualified boiler or furnace \$ _____	Qualified fuel cell pump \$ _____

The standard deduction for the various filing statuses are as indicated:

Itemized Deductions (Complete this page only if greater than standard deduction)

	2018	2017	2016
Married filing joint	24,000	\$12,700	\$12,600
Head of Household	18,000	9,350	9,300
Single or married filing separate	12,000	6,350	6,300

Medical Expense Deductions

Medical, dental & vision insurance premiums ... \$ _____

Long-term care insurance premiums ... \$ _____

Medical expenses not reimbursed by insurance
(out of pocket) including prescriptions,
physicians, clinics/hospitals, vision &
hearing aids, etc. ... \$ _____

Miles driven for medical purposes _____
(Note: nondeductible items include life or disability insurance,
nonprescription drugs, health supplements and health programs)

Taxes Paid

Real estate property taxes ... \$ _____
(ad valorem on personal residence or 2nd home)

State _____ income or _____ intangible taxes ... \$ _____

Personal property taxes ... \$ _____
(if on vehicle, must be based on vehicle value)

Sales tax paid on autos, boats or RVs purchased
for personal use or on materials used for
home improvement ... \$ _____

Local sales tax rate _____ % (if your state rate is 6% and you
pay 7% locally, your local rate is 1%)

Charitable Contributions

Cash or check donations ... \$ _____
(you must have receipt for all individual contributions over \$250)

Miles driven for volunteer work _____

Non-monetary donations of \$500 or less ... \$ _____
(Goodwill, Salvation Army, Amvets, etc.)

For non-monetary donations of \$500 or more, provide name of
organization, description of items donated, the original value of the
items at purchase and the value at the time you donated them
(attach Form 1098-C for donations of vehicles/boat)

Miscellaneous Expense Deductions

List tax return preparation fees, union/professional dues, continuing
education, job search, uniforms, safety deposit box, investment
expenses, gambling losses, etc. List each description & amount.

_____	...	\$ _____
_____	...	\$ _____
_____	...	\$ _____
_____	...	\$ _____
_____	...	\$ _____

Unreimbursed employee business expenses -
attach list or complete the **Business Organizer**.

Interest Expense Deduction

Personal residence 1st mortgage interest &
points (on Form 1098) ... \$ _____

Principal balance of 2nd mortgage on primary
personal residence \$ _____

Personal residence 2nd mortgage interest &
points reported on Form 1098 ... \$ _____

Second home 1st mortgage interest &
points reported on Form 1098 ... \$ _____

If you pay mortgage interest to an individual for a
seller financed mortgage please provide:

Name & social security number ... _____

Address ... _____

Interest paid this year ... \$ _____

Private mortgage insurance (PMI, for a primary
or 2nd home bought in 2007 or later) ... \$ _____

Investment interest (interest paid on loans
used to acquire investment property) ... \$ _____

Personal, consumer interest (credit cards, vehicle, etc.) is not
deductible. If you purchased or refinance your home, provide a copy of
the closing statement. Rental property mortgage interest & taxes
should be entered on the **Rental Property Tax Organizer**. Business
interest & taxes should be entered on the **Business Expense Organizer**.

Other Notes or Questions:
