

ITEMIZED DEDUCTION CHECKLIST

MEDICAL EXPENSES, to the extent they exceed 7.5% of your income (health insurance premiums, long term care premiums, co-pays, deductibles, prescriptions, dental insurance, dentists, x-rays, medical appliances, etc) . Miles driven for medical expenses _____

MORTGAGE INTEREST AND POINTS PAID ON HOME

Amount of mortgage interest _____

Amount of equity interest _____

Balance of mortgage as of December 31, 2022 _____

TAXES PAID IN 2021: (real estate, _____ personal property _____)

CHARITABLE CONTRIBUTIONS

Cash _____ *must have receipts for cash/check donations

mileage driven for charity _____

Other than cash donations _____ *donations must be in good or better condition

OTHER PERTINENT TAX INFORMATION

2021 PREPAID TUITION OR 529 PLAN CONTRIBUTIONS: _____

STUDENT LOAN INTEREST _____

2023 IRA CONTRIBUTIONS: TAXPAYER _____ **SPOUSE** _____ **ROTH or TRAD?**

DATE OF DIVORCE IF PRIOR TO JANUARY 1, 2019: _____

ALIMONY INCOME _____ **ALIMONY PAID** _____

Taxpayer _____ date _____

Spouse _____ date _____