

Schedule A Expense Worksheet

If you have Schedule A Itemized deduction expenses, it is important that you maintain proper records of these expenses. We will NOT audit your records, however, the IRS requires us to be sure that proper records are kept by the taxpayer. These categories are uniform with the Schedule A. Please complete and include with all other tax forms.

Medical/Dental Expenses	Check box if not Applicable	<input style="width: 50px; height: 20px;" type="text"/>	
<i>Doctor, Dentist, Hospital Fees</i>		\$	_____
<i>Insurance Premiums</i>		\$	_____
<i>Medical Aids (Glasses, Contact, Hearing Aids)</i>		\$	_____
<i>Parking Fees & Tolls</i>		\$	_____
<i>Prescription Medicines & Drugs</i>		\$	_____
<i>Medical Miles Driven</i>		Miles	_____
<i>Other</i>		\$	_____

Taxes Paid	Check box if not Applicable	<input style="width: 50px; height: 20px;" type="text"/>	
<i>Personal Property Tax (Car, boats, etc.)</i>		\$	_____
<i>Real Estate Property Tax (Primary & Vacation)</i>		\$	_____
<i>State/Local Taxes (Most cases we will figure this)</i>		\$	_____
<i>Other</i>		\$	_____

Interest Paid	Check box if not Applicable	<input style="width: 50px; height: 20px;" type="text"/>	
<i>Investment Interest</i>		\$	_____
<i>Points Not Reported on 1098</i>		\$	_____
<i>Primary Home Interest NOT reported on 1098</i>		\$	_____
<i>Primary Home Interest reported on 1098</i>		\$	_____
<i>Vacation Home Interest NOT reported on 1098</i>		\$	_____
<i>Vacation Home Interest reported on 1098</i>		\$	_____

Gifts to Charity	Check box if not Applicable	<input style="width: 50px; height: 20px;" type="text"/>	
<i>Gift by Check/Cash under \$250 (no letter required)</i>		\$	_____
<i>Gift by Check/Cash over \$250 (letter required)</i>		\$	_____
<i>Gift other than Check/Cash under \$500</i>		\$	_____
<i>Gift other than Check/Cash over \$500</i>		\$	_____
<i>Charity Miles Driven</i>		Miles	_____

Other Misc Deductions	Check box if not Applicable	<input style="width: 50px; height: 20px;" type="text"/>	
<i>Gambling Losses (up to gambling winnings)</i>		\$	_____
<i>Casualty/Theft Losses of Income Producing Property</i>		\$	_____
<i>Loss from "Other Activities" from Schedule K1</i>		\$	_____
<i>Federal Estate Tax on income in respect to a decedent</i>		\$	_____
<i>Deduction for an amortizable bond premium</i>		\$	_____
<i>An ordinary loss attributable to a contingent or inflation indexed</i>		\$	_____
<i>Deduction for repayment of amounts under a claim of right over</i>		\$	_____
<i>Certain unrecovered investment in a pension</i>		\$	_____
<i>Impairment-related work expenses of a disabled person</i>		\$	_____