

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

Doctor, Dentist, Hospital Fees

\$ _____

Insurance Premiums

\$ _____

Medical Aids (Glasses, Contact, Hearing Aids)

\$ _____

Parking Fees & Tolls

\$ _____

Prescription Medicines & Drugs

\$ _____

Medical Miles Driven

Miles _____

Other

\$ _____

Taxes Paid

Check box if not Applicable

Personal Property Tax (Car, boats, etc.)

\$ _____

Real Estate Property Tax (Primary & Vacation)

\$ _____

State/Local Taxes (Most cases we will figure this)

\$ _____

Other

\$ _____

Interest Paid

Check box if not Applicable

Investment Interest

\$ _____

Points Not Reported on 1098

\$ _____

Primary Home Interest NOT reported on 1098

\$ _____

Primary Home Interest reported on 1098

\$ _____

Vacation Home Interest NOT reported on 1098

\$ _____

Vacation Home Interest reported on 1098

\$ _____

Gifts to Charity

Check box if not Applicable

Gift by Check/Cash under \$250 (no letter required)

\$ _____

Gift by Check/Cash over \$250 (letter required)

\$ _____

Gift other than Check/Cash under \$500

\$ _____

Gift other than Check/Cash over \$500

\$ _____

Charity Miles Driven

Miles _____

Other Misc Deductions

Check box if not Applicable

Gambling Losses (up to gambling winnings)

\$ _____

Casualty/Theft Losses of Income Producing Property

\$ _____

Loss from "Other Activities" from Schedule K1

\$ _____

Federal Estate Tax on income in respect to a decedent

\$ _____

Deduction for an amortizable bond premium

\$ _____

An ordinary loss attributable to a contingent or inflation indexed d

\$ _____

Deduction for repayment of amounts under a claim of right over

\$ _____

Certain unrecovered investment in a pension

\$ _____

Impairment-related work expenses of a disabled person

\$ _____