



Non-Business Deductions

All Professions

Joint Filers: Except where noted, please combine your expenses on this worksheet.

Please round all amounts to the NEAREST \$1.00.

(For example, enter \$42 for a deduction of \$42.49. Enter \$43 for a deduction of \$42.50)

Name:

Tax Year:

Adjustments & Credits

IRA Contributions (not 401F / 403B, etc.)	Taxpayer: \$ <input type="checkbox"/> Trad. <input type="checkbox"/> Roth	Spouse: \$ <input type="checkbox"/> Trad. <input type="checkbox"/> Roth
Moving Expenses	\$ <i>Must be work-related and meet distance requirement.</i>	
Education Expenses	Tuition: Please provide Form(s) 1098-T Student Loan Interest: Please provide Form(s) 1098-E 529 Plan Contributions: \$	
Child & Dependent Care Expenses (Both spouses must have worked and/or attended school.)	Third Party Provider: <input type="text"/>	EIN/SSN: <input type="text"/>
	Address: <input type="text"/>	
	Child Name: <input type="text"/>	Expense: \$ <input type="text"/>
	(Note additional providers and/or children on reverse.)	

Non-Business Itemized Deductions

Medical Expenses (see also Health Insurance Worksheet)	\$ <i>Total unreimbursed cost of doctors, dentists, Rx, eyeglasses, med. equip., etc.</i>	
	Med. <u>Insurance</u> Premiums: \$ <input type="text"/>	
Taxes & Interest Paid Provide 1098(s) for mortgage <u>interest</u> .	Real Estate Tax (If not on 1098): \$ <input type="text"/>	Mortgage <u>Insurance</u> Premium: \$ <input type="text"/> (not interest)
	State Taxes: \$ <input type="text"/> <i>Balances due paid with any state tax returns filed last year - <u>not</u> from W2s</i>	
Charitable Donations	Cash: \$ <input type="text"/> *Non-Cash: \$ <input type="text"/> <i>(Clothing, furniture, etc. @ resale value.)</i> *\$500 limit on non-cash donations: if higher, please provide receipts with donee name & address	
Tax Preparation Fees	\$ <input type="text"/>	

Estimated Taxes Paid (Not from W2 withholding)

Federal			State		
	Date Paid	Amount		Date Paid	Amount
1st Quarter		\$ <input type="text"/>	1st Quarter		\$ <input type="text"/>
2nd Quarter		\$ <input type="text"/>	2nd Quarter		\$ <input type="text"/>
3rd Quarter		\$ <input type="text"/>	3rd Quarter		\$ <input type="text"/>
4th Quarter		\$ <input type="text"/>	4th Quarter		\$ <input type="text"/>