

## **Itemized Deductions**

The following are areas to consider when submitting your itemized deductions to the IRS. List your total expenses in each category that applies to you. If the IRS audits your return, they may ask you to provide proof (e.g., receipts, canceled checks, bank statements, credit card bills, etc.). Do not include these documents with this form but do keep them on file. If you prefer The Tax Lady total your receipts for you, we charge an additional \$125 an hour for this work, on top of tax preparation fees.

**Medical Expenses** (Do not include insurance premiums deducted from your pay, expenses that were reimbursed by your insurance company, or expenses paid from a flexible spending account.)

Medical Doctors	\$ _____	Prescription Medications	\$ _____
Eye Doctors	\$ _____	Eye glasses/contacts	\$ _____
Dentists	\$ _____	Lab fees	\$ _____
Hospital fees	\$ _____	Long-term Care Premiums	\$ _____
Guide Dog Costs	\$ _____	Out-of-Pocket Health Insurance	\$ _____
Weight-Loss Program (disease-related)	\$ _____	Addiction Services	\$ _____
Other (explain) _____	\$ _____	Other (explain) _____	\$ _____
Mileage to and from doctors, dentists, pharmacists, hospitals, etc. _____			

## **Charitable Contributions**

Cash \$ \_\_\_\_\_ (this includes amounts paid in cash, by check, or by credit card)

Household Goods \$ \_\_\_\_\_ (for help with values, see [www.kayethetaxlady.com/wp-content/uploads/2016/08/FMV-Guide.pdf](http://www.kayethetaxlady.com/wp-content/uploads/2016/08/FMV-Guide.pdf))

Miles drive for volunteer work \_\_\_\_\_

**Work-related Expenses** (The IRS no longer allows these deductions, however, some states [e.g., Alabama] still do allow them. Do not list expenses that were reimbursed by your employer.)

Uniforms, Shoes, Safety Equipment	\$ _____	Union Dues	\$ _____
Laundry of uniforms	\$ _____	Professional Memberships	\$ _____
Mileage	# _____	Tuition (seminars, classes)	\$ _____
Travel costs (plane, bus, rental car)	\$ _____	Parking, tolls	\$ _____
Office Supplies (call if 1 item > \$200)	\$ _____	Business Meals or # of Travel Days	\$ _____
Work Supplies (call if 1 item > \$200)	\$ _____	Other (explain) _____	\$ _____

## **Other Expenses**

Mortgage Interest: Please provide your 1098 \_\_\_\_\_ Vehicle Tax (amount written as "ad valorem tax") \$ \_\_\_\_\_

Previous Year's Tax Prep Fees \$ \_\_\_\_\_ Safe Deposit Box \$ \_\_\_\_\_

Real Estate/Land Tax \$ \_\_\_\_\_ Investment Expenses \$ \_\_\_\_\_

List and describe any other expenses you had that you believe may be deductible:

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