

YES

NO

DURING THE TAX YEAR, DID YOU....

IF YES, PLEASE....

DEDUCTIONS

PAY MORTGAGE INTEREST ON YOUR HOME

ATTACH FORM 1098 FOR MORTGAGE INTEREST PAID

PAY PROPERTY TAX ON YOUR HOME

ENTER AMOUNT HERE _____

PAY PROPERTY TAX ON YOUR AUTOMOBILES , BOATS,
OR OTHER PERSONAL PROPERTY

ENTER AMOUNT HERE _____

CONTRIBUTE CASH TO CHARITABLE ORGANIZATIONS

ENTER AMOUNT HERE _____

MAKE NONCASH CONTRIBUTIONS TO CHARITIES

ATTACH RECEIPTS WITH VALUE OF DONATIONS NOTED

PAY MEDICAL EXPENSES (INCLUDING HEALTH INSURANCE,
COPAYS, DENTISTS, EYE DOCTORS, PRESCRIPTIONS, ETC.)
THAT EXCEED 7.5% OF YOUR TOTAL INCOME

ENTER TYPE AND AMOUNTS

HAVE GAMBLING LOSSES

ENTER AMOUNT HERE _____

CREDITS & ADJUSTMENTS

PAY FOR CHILDCARE SO THAT YOU AND YOUR
SPOUSE (IF APPLICABLE) COULD WORK

ATTACH THE CHILD CARE PROVIDERS YEAR END STATEMENT

PAY FOR HIGHER EDUCATION FOR YOURSELF,
YOUR SPOUSE, OR DEPENDENTS

ATTACH FORM 1098-T

CONTRIBUTE TO AN IRA, SEP OR SIMPLE PLAN

ENTER TYPE AND AMOUNT HERE _____

PAY EDUCATOR EXPENSES

ENTER AMOUNT HERE _____

PAY STUDENT LOAN INTEREST

ENTER AMOUNT HERE _____

ENTER CHANGES IN TAX SITUATION, QUESTIONS, OR MATTERS WE NEED TO DISCUSS HERE: