

2013 ITEMIZED DEDUCTION CHECKLIST

CLIENT NAME _____

2013 EXPENSES

MEDICAL AND DENTAL EXPENSES - include prescriptions; non-prescription medical supplies such as crutches; doctors, dentists, nurses, hospitals, medical insurance premium, medical miles or actual expense.

Health insurance premiums from paychecks, etc _____
Prescriptions _____
Eyeglasses, contacts, eye exams, etc _____
Doctors _____
Dentists _____

number of medical miles: _____
1/1-12/31/2013 X 24.0 cents = \$ _____
Parking fees / tolls: \$ _____

TAXES PAID

State income tax (will pull from W-2s) _____
Real estate taxes (if new homeowner, request HUD-1 stmt) _____
New motor vehicle tax _____

INTEREST PAID

Home Mortgage Interest _____ How many 1098's? _____
(If new homeowner, request HUD-1 stmt)
Points paid for new home _____
Points paid on refinance - Length of loan? _____
If new home or refinance in 2013, PMI? _____
Investment interest expense (ie, margin interest, from broker statements) _____

CONTRIBUTIONS

Need receipts for contributions of \$250 or more per donee
Cash contributions:

Non-Cash contributions:
(If more than \$500, get receipt for donation and list of items donated, including value and address of donee)

Number of charity miles: _____
1/1/13 - 12/31/13 x 14 cents = _____
Parking fees / tolls: \$ _____

CASUALTY LOSS

FMV of property before storm _____
FMV of property after storm _____
Insurance of FEMA proceeds received _____

EMPLOYEE BUSINESS EXPENSES (form 2106 to sched A)

Parking fees, tolls, local transportation _____
Overnight travel expenses _____
Meals and entertainment _____
Dues and subscriptions _____
Uniforms _____
Unreimbursed exp's for books, software, etc _____
Other: _____

Total miles driven: _____
1/1-12/31/2013 X 56.5 cents = \$ _____
Parking fees / tolls: \$ _____

Tax Prep Fee Paid For 2013 tax return _____
Others, such as safe deposit box, investment expense _____

Gambling losses _____

Missing Information:

- 1) _____
- 2) _____
- 3) _____
- 4) _____