

ITEMIZED DEDUCTIONS

MEDICAL EXPENSES PAID

To be deductible, medical expenses must exceed 7 1/2% of your adjusted gross income, and then, only to the extent the amount that exceeds the 7 1/2% floor is deductible. Example: Your income is \$40,000 for the year-your medical must exceed \$3,000. Do not include medical expenses that were reimbursed by insurance or paid for by flex spending or Sec. 125 plans.

Insurance Premiums: Hospital, Medical, Dental, Medicare*			
Doctors, Dentists, Physchotherapy & Psychological Counseling			
Hospitals, Nursing Home, Nursing Care, Lodging, etc.			
Prescription Drugs (no-"over-the-counter" drugs)			
Glasses, Hearing Aids, Batteries, etc.		Auto Travel	# of Miles
Lab & X-Ray		Parking Fees	
Supplies, Rentals, etc.		Phone (toll only)	
Other:			
Insurance Reimbursement (only for amounts listed above)			()

*Amounts withheld from Social Security Benefits only.

TAXES PAID

Real Estate-Home & 2nd Home ONLY (not rental)			
Real Estate-Investment Property (land, etc.)(not rental)			
Vehicle License Fees:	1)	2)	3) 4)
Personal Property Tax (boat, plane, etc.)			

State Income Tax Paid (provide cancelled checks)

Balance Due or Last Year's Return		Prior Years Tax or adjustment	
Extension Payment Last Year's Return		Last Year's 4th Qtr. Pd Jan of this year	

HOME MORTGAGE INTEREST PAID

Provide 1098s--Enter Rental Interest in Rental Section		Primary Home	Second Home
1st TD	Paid to a Bank, S & L, etc.*		
	Paid to an Individual (must list name,address & SSN below**)		
2nd TD	Paid to a Bank, S & L, etc.*		
	Paid to an Individual (must list name,address & SSN below**)		
Home Equity Loan			
Individual's Name:**		SS#**	

Address:**

*Amounts must agree with Form 1098 issued by the financial institution. If not, check here:

If Form 1098 was issued in another's social security number, enter that person's name and

Social Security number here: **NAME:** **SS#**

If the second home is a qualified motor home,

boat, etc list the name of the payee here:

	YES	NO
Did you refinance during the year? If so, provide final escrow statement		
Does your home equity loan exceed \$100,000.?		
Does the sum of all home mortgages exceed \$1,100,000.?		

