

Itemized Deduction Worksheet for 2024 Federal Income Taxes

Please take the time to fill this form out neatly. This is to aid in your planning for your tax preparation appointment. **It is very important that you maintain all of the documentation that supports these expenses. Please bring with you all receipts from your charitable contributions,** as it is necessary that we know to whom the donations were made, so that we may report them accurately on your tax return.

****This sheet in no way represents all of the available deductions for taxpayers. It is simply to aid in your planning and provide you with a guide to some of the more utilized deductions.*

Taxpayer's Name: _____

Medical Expenses

- Supplemental/Secondary Ins. (Taxpayer) \$ _____
- Supplemental/Secondary Ins. (Spouse) \$ _____
- Long Term Care Insurance (Taxpayer) \$ _____
- Long Term Care Insurance (Spouse) \$ _____
- Dental (out of pocket) \$ _____
- Prescriptions (out of pocket) \$ _____
- Co-pays / Deductibles \$ _____
- Vision / Eyeglasses \$ _____
- Medical Equipment i.e. hearing aides \$ _____
- Misc. Med. Expense i.e. homecare \$ _____
- Medical Miles Driven _____

Real Estate Taxes Paid in 2023 \$ _____

Mortgage Interest paid in 2023 \$ _____

Contributions

- Checks (bring list) \$ _____
- Religious Organizations \$ _____
- Non-Cash (goods) **Bring Receipts** \$ _____
- Volunteer Miles Driven _____

Estimated Payments *(please check all dates below for payments)*

4/15/2024 _____

6/15/2024 _____

9/15/2024 _____

1/15/2025 _____

Taxpayer's Signature

Spouse's Signature