

1040

US

Itemized Deductions

Please enter all pertinent amounts and attach all 1098 forms.

MEDICAL AND DENTAL EXPENSES

NOTE: Enter self-employed health insurance premiums on Sheet 24 and Medicare insurance premiums on Sheet 14.

	Amount	TS
Prescription medicines and drugs		
Doctors, dentists and nurses		
Hospitals and nursing homes		
Insurance premiums not entered elsewhere (excl. LT care & amts. paid w/pre-tax dollars) ..		
Long-term care premiums - taxpayer		
Long-term care premiums - spouse		
Insurance reimbursement (enter as a positive number)		
Lodging and transportation:		
Out-of-pocket expenses		
Medical miles driven		
Other medical and dental expenses:		

TAXES PAID

State income taxes - Jan payment on state estimate		
State income taxes - paid with state return extension		
State income taxes - paid with state return		
State income taxes - paid for prior years and/or to other state		
City/local income taxes - 1/ payment on city/local estimate		
City/local income taxes - paid with city/local extension		
City/local income taxes - paid with city/local return		

SALES AND USE TAXES PAID

State and local sales taxes (except autos and special items)		
Use taxes paid on purchases		
Use taxes paid with state return		
Sales tax on autos not included above		
Sales tax on boats, aircraft, other special items		

OTHER TAXES PAID

Real estate taxes - principal residence:		

Real estate taxes - property held for investment		
Personal property taxes (including auto fees in some states. Provide a copy of tax notice) ..		
Foreign income taxes		
Other taxes:		

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Itemized Deductions (continued)

Please enter all pertinent amounts.

INTEREST PAID

Home mortgage int. (Box 1) and points (Box 2) reported on Form 1098:

Amount

TS

Three horizontal lines for entering mortgage interest and points.

Table with 3 columns: Amount, TS, and a blank column. 3 rows for data entry.

Home mortgage interest not reported on Form 1098:

- Payee's name
Payee's SSN or FEIN
Payee's street address
Payee's city
Payee's state
Payee's ZIP code
Payee's region
Payee's postal code
Payee's country

Form with 8 rows for entering payee information.

Amount paid

Table with 3 columns: Amount, TS, and a blank column. 1 row for amount paid.

Points not reported on Form 1098:

Horizontal line for entering points.

Table with 3 columns: Amount, TS, and a blank column. 1 row for points.

Mortgage insurance premiums on post 12/31/06 contracts (Box 4)

Table with 3 columns: Amount, TS, and a blank column. 1 row for mortgage insurance.

Investment interest (interest on margin accounts):

Horizontal line for entering investment interest.

Table with 3 columns: Amount, TS, and a blank column. 1 row for investment interest.

Passive interest

Table with 3 columns: Amount, TS, and a blank column. 1 row for passive interest.

Certain home mortgage interest included above (6251)

Table with 3 columns: Amount, TS, and a blank column. 1 row for certain mortgage interest.

NOTE: Points paid on loans other than to buy, build, or improve your main home are deductible over the life of the mortgage. For these types of loans also provide the dates and lives of the loans.

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Churches, schools, hospitals, and other charitable organizations (50% limitation):

Contributions by cash or check:

Four horizontal lines for entering cash or check contributions.

Table with 3 columns: Amount, TS, and a blank column. 4 rows for cash or check contributions.

Volunteer expenses (out-of-pocket)

Table with 3 columns: Amount, TS, and a blank column. 1 row for volunteer expenses.

Number of charitable miles

Table with 3 columns: Amount, TS, and a blank column. 1 row for charitable miles.

Veterans' organizations, fraternal societies, nonprofit cemeteries, and certain private nonoperating foundations (30% limitation):

Contributions by cash or check:

Four horizontal lines for entering cash or check contributions.

Table with 3 columns: Amount, TS, and a blank column. 4 rows for cash or check contributions.

Volunteer expenses (out-of-pocket)

Table with 3 columns: Amount, TS, and a blank column. 1 row for volunteer expenses.

Number of charitable miles

Table with 3 columns: Amount, TS, and a blank column. 1 row for charitable miles.

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Itemized Deductions (continued)

Please enter all pertinent amounts. Last year's amounts are provided for your reference.

NONCASH CONTRIBUTIONS

NOTE: Use Sheet 26 if total noncash contributions are over \$500. No deduction is allowed for contributions of clothing and household items that are not in good used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

50% limitation (see above):

Horizontal lines for 50% limitation entries

Table with columns: Amount, TS

30% limitation (see above):

Horizontal lines for 30% limitation entries

Table with columns: Amount, TS

30% capital gain property (gifts of capital gain property to 50% limit orgs.):

Horizontal lines for 30% capital gain property entries

Table with columns: Amount, TS

20% capital gain property (gifts of capital gain property to non-50% limit orgs.):

Horizontal lines for 20% capital gain property entries

Table with columns: Amount, TS

MISCELLANEOUS DEDUCTIONS (subject to 2% AGI limit)

Union and professional dues

Table with columns: Amount, TS

Other unreimbursed employee expenses (uniforms and protective clothing, professional subscriptions, employment agency fees, and certain edu. expenses):

Horizontal lines for other unreimbursed employee expenses

Table with columns: Amount, TS

Investment expense:

Horizontal lines for investment expense

Table with columns: Amount, TS

Tax return preparation fee

Safe deposit box rental

Table with columns: Amount, TS

Miscellaneous deductions (2% AGI) (certain legal and accounting fees, and custodial fees):

Horizontal lines for miscellaneous deductions

Table with columns: Amount, TS