

III. Adjustments, Credits and Deductions (Please give the total spent in each of the below categories):

A. If you made an IRA (traditional and/or ROTH) contribution, please provide all details. The annual account statement should be fine.

B. Self-employed health insurance premiums paid _____

C. College Students: **Please provide 1099-T & Student Loan Interest statements**

1. Is this the 1st or 2nd year of Post-secondary education? Yes No

2. School year of student last year: _____

3. College tuition paid direct or by loan: _____

4. Works: full-time part-time **Check to see if the student needs to file a return.**

5. Student Loan interest paid: _____

D. Medical expenses, not paid by insurance or employer.

Include: Insurance premiums, doctors, prescriptions, dentists, hospitals, mileage, and prescribed equipment (such as eyeglasses, hearing aids, dentures, non-prescription drugs, etc.) Please use Part IX to help you itemize the expenses.

Total Medical Expenses: _____

E. Real estate taxes paid. _____

F. Other taxes paid in year (not included on W-2's or in estimated taxes). _____

G. Home mortgage/equity loan interest paid. Attach all 1098 statements. _____

H. Points paid on purchase of home (send copy of HUD-1 statement). _____

NOTE: You must have written proof of any charitable contributions in the form of bank records (cancelled check) or a letter from the donee showing the name of the donee, the date of the contribution, and the amount of the contribution). You must have written records (e.g. mileage log) documenting any miles driven for charity work.

Please, do not send your records to us. A written summary will be sufficient.

I. Charitable cash contributions made. _____

K. Number of miles driven for charity work _____

L. Noncash charitable contributions made _____

If property worth more than \$500 was donated during the year, please provide the information listed below on another sheet of paper:

Name and address of recipient organization. Description of property. Date of donation. Date property acquired. How property was acquired? (Purchase, gift, other) Cost of property. (If acquired by gift, the donors' cost) Fair market value of property at the time of donation.

Method used to determine fair market value (appraisal, garage sale) **Noncash gifts valued at more than \$5,000 require special 'handling'**

M. Previous year's tax preparation fees _____

N. Child Care Expenses Child 1 Child 2
Name of Child: _____

Total Child Care Exp. paid while you and/or your spouse worked. _____

Name, address AND social security number OR federal identification number of each provider:

