

Deductions, Adjustments & Credits

MEDICAL EXPENSES

Medical Insurance \$ _____
 Deductions, Adjustments & Credits \$ _____

CREDITS

Long Term Care Insurance \$ _____
 Drugs, Medicine, Insulin \$ _____
 Contact Lens Insurance \$ _____
 Doctors & Dentists: (include Chiropractor) \$ _____
 Nurses \$ _____
 Laser Eye Surgery \$ _____
 Glasses & Contact Lenses \$ _____
 Hearing Aids & Batteries \$ _____
 Ambulance \$ _____
 Hospitals, Lab Fees \$ _____
 Braces & Dentures \$ _____
 Auto Mileage ___ miles / \$ _____
 Other Medical Travel! Expense _____
 Medical Equipment ~ Purchase or Rental \$ _____
 (Crutches, Wheelchairs, Walkers, Etc.)
 Physical & Mental Therapy \$ _____
 Whirlpool Baths & Therapy Equipment \$ _____
 (Doctor Prescribed)
 Special School _____
 Home for Mentally or Physically Disabled Person \$ _____
 Treatment at a Drug or Alcohol Rehab Center \$ _____
 Cost & Care of Guide Dog \$ _____
 Other Medical Expenses: _____ \$ _____
 Stop-Smoking Programs \$ _____
 Prescribed Drugs for Nicotine Withdrawal \$ _____
 Nursing Home (for medical care) \$ _____
 Weight Loss Program for Treatment of Special Disease \$ _____

TAXES

Real Estate Taxes \$ _____
 Real Estate Taxes Received from Prior Owner \$ _____
 State Tax Estimates Paid in 2012 \$ _____
 Personal Property Tax \$ _____
 Automobile License (Iowa Only) \$ _____
 Weight of Auto (Iowa Only) \$ _____
 Sales Tax Paid on Boats \$ _____
 Sales Tax Paid on Motor Vehicles (on & off road) \$ _____
 Date Purchased _____
 Sales Tax Paid on Home Building Materials \$ _____
 Sales Tax Paid on Mobile Home \$ _____
 Sales Tax Paid on Prefab Home \$ _____

INTEREST

Home Mortgage \$ _____
 Home Equity \$ _____
 Points Paid \$ _____
 Investment Interest Expense \$ _____
 Interest Paid on Student Loan (I 098E) \$ _____
 Qualified Mortgage Insurance Premiums \$ _____

CREDITS

Mortgage Interest/
 Credit Certificate (Bring Certificate) \$ _____
 Child Adoption Expenses \$ _____
 Child Care Expense and Information \$ _____
 American Opportunity Credit (I098T) \$ _____
 Tuition fees & Higher Education (I098T) \$ _____

CONTRIBUTIONS

Cash Contributions \$ _____
 Non-Cash Contributions \$ _____
 Charitable Auto Mileage (_____ Miles) \$ _____

MISCELLANEOUS

Mal-practice Insurance \$ _____
 Union Dues \$ _____
 Professional Dues & Subscriptions \$ _____
 Uniforms, Safety & Protective Equip for Work \$ _____
 Tools for Work \$ _____
 Employment Agency Fees \$ _____
 Safe Deposit Box \$ _____
 Tax Return Preparation Fees \$ _____
 Employee Education Expenses \$ _____
 Physical Exams (Required) \$ _____
 Route Overages / Shortages \$ _____
 Job Search Fees and Materials \$ _____
 Investment Fees & Subscriptions \$ _____
 Gambling Losses (up to amount of winnings) \$ _____
 Legal Expenses to Produce Taxable Income \$ _____
 Penalty on Early Withdrawal of Savings \$ _____
 Trustee's Fees for IRA if Separately Paid \$ _____
 Payments to KEOGH & SEP Plans \$ _____
 Casualty & Theft Losses \$ _____
 Custodial (e.g. Trust Account) Fees \$ _____
 Moving Expenses \$ _____
 IRA Contributions \$ _____
 Alimony Paid (not Child Support) \$ _____
 Exchange Student Lived w/ you Yes ___ No ___ \$ _____
 Foster Children Yes ___ No ___ \$ _____
 Financial Planning/Consultation Fees \$ _____
 Teachers: Classroom Supplies, Books, etc.
 used in Classroom \$ _____

IOWA RESIDENTS

Iowa residents need weight of car (on registration form) \$ _____
 Student dependents (K-12 Grades) Tuition and Textbooks \$ _____
 Materials required for Extra Curricular Activities \$ _____

WISCONSIN RESIDENTS

Tuition paid to University, College or Technical College \$ _____
 Rent and Rent Certificates \$ _____

ILLINOIS RESIDENTS

Student Dependents (K-12 Grades)
 Tuition, Textbooks, Lab fees \$ _____
 Property Tax Index Number _____ \$ _____

Questions?

(None are a waste of time as it is your tax return and dollars we are talking about!)