

Name:

Guidance: We do not need your details. Just enter your totals for each expense line even if it doesn't seem like you will have enough to itemize. We will determine whether your total itemized deductions or the Standard Deduction for 2020 is better for you. [Single or Married Filing Separately: \$12,400. Married Filing Jointly: \$24,800. Head of Household \$18,650. In addition, if blind or over 65: \$1,300 for each married filer on a joint return, \$1,650 for Single and Head of Household filers.]

Medical and Dental Expenses

Guidance: Medical and dental expenses are **deductible only to the extent they exceed 7.5%** of your Adjusted Gross Income for Tax Year 2020 and are not reimbursed/paid by insurance.

Medical and dental insurance premiums paid to insurer by taxpayer or spouse, (exclude Medicare reported on an SSA-1099; exclude premiums reported on a Schedule C worksheet)	\$
Long term care insurance premiums (exclude premiums reported on a Schedule C worksheet) (if more than one person list each separately)	\$
Amounts paid directly to doctors and dentists	\$
Amounts paid for prescription medications	\$
Amounts paid for medical imaging (X-Rays, CAT Scans, MRI, etc.), Lab Work, ...	\$
Nursing care (excluding healthy baby or housework components of payments)	\$
Hospital care including meals and lodging	\$
Medical aids (prescription eye glasses, hearing aids, crutches, wheelchairs, ...)	\$
Medical mileage driven for care (enter total number of miles)	
Other medical expenses (explain)	\$

Notes and questions:

Taxes You Paid

(generally limited to a maximum of \$10,000)

Did you live in the same Zip Code all year? (Y/N)		If 'No', what other Zip Codes did you live in last year?	Other ZIP 1	Days in other ZIP 1
IF 'No', how many days did you live in the Zip Code on your Intake Form?			Other ZIP 2	Days in other ZIP 2
Sales tax on major purchases (car/boat/motorhome, home purchase or substantial addition to home, if general sales tax applies, ...)			\$	
4 th Quarter 2020 State Income Tax Estimated Payment if paid after 12/31/2019			\$	
Property taxes (non-Business Property)			\$	
Tax deductible portion of vehicle registrations (only the line labeled "vehicle license fee")			\$	
Other State & Local taxes (explain):			\$	

Mortgage Interest

Guidance: Mortgage Interest is only deductible for mortgages on your primary residence and one secondary home, up to certain principal amounts depending on the year the loan originated, and only to the extent proceeds were used to buy, build or substantially improve the residence which is the collateral for the mortgage. The interest on a home equity loan is disallowed as a mortgage interest deduction unless the home equity loan was used to build, buy, or substantially improve a qualified residence. Interest on loans which do not meet these requirements is not deductible.

Include any Form 1098 Mortgage Interest Statements in the Tax Documents you provide to Tax-Aide

Were the proceeds of the loan(s) used entirely to buy, build or substantially improve only the residence which is the collateral for the mortgage? If No , we will be unable to include mortgage interest as an itemized deduction.	Main Mortgage (Y/N)	Home Equity Loan (Y/N)
Main home mortgage (add second page if there is a secondary home)	Original principle amount	\$
	Date of loan	
	2020 interest paid	\$
	Private Mortgage Insurance required by lender	\$
Home equity loan used only to build, buy, or substantially improve residence	Original principle amount	\$
	Date of loan	
	2020 interest paid	\$
	Private Mortgage Insurance required by lender	\$

Gifts to Charity

Note: up to \$300 of cash charitable contributions can be deducted if you do not itemize.

Cash Gifts to Charity - (including check, credit/debit card) – Enter as a total on this line: (you need to keep evidence of each; if \$250 or more, must be in writing from charity)	\$
Did you make non-cash gifts to charity(s)? (Y/N)	Charitable miles
IF "Yes" did they total less than \$500?	Total of all non-cash gifts
	\$

IF non-cash gifts total more than \$500 continue providing required information for each charity below. If you donated to more than two charities add a page. **If you donated a vehicle include the 1098C in the Tax Documents you provide.** (We are unable to prepare your return if the total is more than \$5,000 or you donated a vehicle worth more than \$500.)

For non-cash gift to charity > \$500 provide a description and fair market value of the property for each charity:		
Name & address of the organization you donated to:		
Date of contribution:	Date you acquired:	Did you receive a 1098C? (Y/N)

For a non-cash gift to charity > \$500 provide a description and fair market value of the property:		
Name & address of the organization you donated to:		
Date of contribution:	Date you acquired:	Did you receive a 1098C? (Y/N)

Miscellaneous Itemized Deductions

Gambling losses (if more than gambling winnings, also check here [])	\$
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