

Itemized Deductions Worksheet

Deductions must exceed \$12,950 Single, \$25,900 MFJ, \$19,400 HOH, or \$12,950 MFS to be a tax benefit.

Medical Expenses. Must exceed 7.5% of income to be a benefit — include cost for dependents — do not include any expenses that were reimbursed by insurance or paid with funds by FSA, HAS, or HRA.

Charitable Contributions. If over \$500 in noncash charitable contributions, provide details of contributions. Rules require that the taxpayer retain documentation for all contributions.

Dentists	\$	Hospitals	\$	Cash	\$
Doctors	\$	Insurance	\$	Noncash contributions (FMV). Clothing or household items must be in good used condition or better.	\$
Equipment	\$	Prescriptions	\$	Did you transfer funds from an IRA directly to a charity? Yes No	\$
Eyeglasses	\$	Other	\$		
Medical Miles: Jan-Jun _____ July-Dec _____					

Taxes Paid. Do not include taxes paid for full or partial business or rental-use property, including business use of the home.

Casualty and Theft Losses: If you suffered any sudden, unexpected damage or loss of property, or a theft in a federally-declared disaster area, provide details to your tax preparer. Yes No

State withholding	Reported on W-2	
State estimated taxes — paid in 2022	\$	
Real estate tax — residence	\$	
Real estate tax — other	\$	
Personal property taxes	\$	
Property tax refund — received in 2022	\$()	
Foreign tax paid	\$	
Other	\$	
Other	\$	
Other	\$	

Miscellaneous Itemized Deductions. Miscellaneous itemized deductions subject to the 2% AGI limitation are no longer deductible on the federal return. However, these expenses may still be deductible on your state return. For use of home, auto mileage, or other job-related expenses, provide information on a separate sheet. Were any expenses reimbursed by your employer? Yes No

Miscellaneous Itemized Deductions (CA Only)

Dues	\$	Subscriptions	\$
Investment Expenses	\$	Supplies	\$
Job Education	\$	Tax Prep Fees	\$
Job Seeking	\$	Tools	\$
Legal Fees	\$	Uniforms	\$
Licenses	\$	Union Dues	\$
Safety equipment	\$	Other	\$
Other	\$	Other	\$

Did you keep receipts for sales tax paid during 2022? Yes No
 Did you purchase a car, plane, boat, or home in 2022? Yes No
 Sales tax paid \$ Purchase paid \$ Date

Interest Paid. Do not include interest paid for full or partial business or rental-use property, including business use of the home. Provide all Forms 1098 or lender information and ID numbers.

Main Home	\$	Equity loan	
Second Home	\$	Equity loan	
Points	\$	Investment Interest	

Other Deductions. These deductions are not subject to a 2% of income limit

Gambling Losses	\$	Fed Estate tax on IRD	\$
Impairment-Related expenses	\$	Other	\$

Did you pay a mortgage insurance premium when you purchased your home? Amount \$ Date

- Notes:**
- Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses
 - Work clothing is not deductible if adaptable for every day wear. Exception for safety equipment, such as steel-toe boots.
 - Expenses to enable individuals, who are physically or mentally impaired, to work are generally deductible.

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