

Itemized Deductions Worksheet

Deductions must exceed \$13,850 Single, \$27,700 MFJ/QSS, \$20,800 HOH, or \$13,850 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: _____ @ 22¢				Charitable Mileage	

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 2023	\$
Real estate tax — residence	\$
Real estate tax — other	\$
Personal property taxes	\$
Property tax refund — received in 2023	\$ ()
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 2023? Yes No
 Did you purchase a car, plane, boat, or home in 2023? 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.

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Tucker's Tax Service has a secure portal for our clients to safely upload their private documents into. We do not recommend sending any sensitive information via email or fax.