

Bottom Line

18105 Main Street
Jamestown, CA 95327

Medical Expenses You Paid in 2023:

* Medical Insurance Premiums \$ _____
Long Term Health Care Ins. _____
Prescription Drugs _____
Copayment made directly to
doctors, dentists, hospitals,
glasses/contacts, nursing care,
hearing aids/batteries etc. _____
Parking Fees and Tolls _____
Medical Miles Driven _____
Other _____

Reimbursements Received _____

Charitable Contributions You Made:

Checks and Receipted Amounts \$ _____
Cash Amounts _____
Value of Non-Cash Goods
Given to Charity _____
Miles Driven for Charity _____

Any cash or non-cash contribution MUST be substantiated by a receipt or letter from the charity per IRS rules.

Non-cash goods totaling over \$500 MUST be itemized. Any single item valued over \$5000 must have an appraisal.

Taxes You Paid in 2023:

Real Estate - Your Home \$ _____
Real Estate - 2nd Home _____
Real Estate - Other Property _____
Prior State Income Tax Paid _____
DMV Car Registration _____
Vehicle Licence Fee #1 _____
Vehicle Licence Fee #2 _____
Sales Tax on new car or boat _____
Other _____

Miscellaneous Deductions in 2023:

* Job Education \$ _____
Union and Professional Dues _____
Tools/Equipment _____
Safety Clothes and Equipment _____
Uniforms and Cleaning _____
Other _____

Federal does not allow.
California still allows.

Interest You Paid in 2023:

1st Mortgage \$ _____
2nd Mortgage/ Equity Line _____
Mortgage Paid to Individual _____
Points to Obtain New Loan _____
Investment Interest Paid _____
Business Interest Paid _____
* Student Loan Interest _____

• IMPORTANT: Federal only allows a deduction for mortgage interest used to buy or improve your home.

Other Items of Note:

• EMPLOYEE EXPENSES -- Bring in your records of Business Vehicle miles. Remember commute is not deductible. Deductible mileage must have a written log to substantiate the expense.

* These expenses may be deductible even if you do not itemize.