

Name _____

Miscellaneous Credits and Itemized Deductions 2017

Please don't hesitate to ask us to help you understand if and when these various deductions will help you. We want to help you maximize your deductions WITHOUT having you keep track of, or search for records, when they won't help. When in doubt ask! Or, give us this form with a "?" next to an item. We'll give you a call.

● Available Even If You Don't Itemize:

IRA Contributions: Taxpayer \$ _____ Spouse \$ _____

(Only if at least one of you is working or in school) Traditional or Roth Traditional or Roth

College Expenses: Get us a **1098T from the school** and **a copy of the statement**

showing tuition billed and paid *for all available years* (The student usually has to get this on line.)

Total expenses for required books, supplies and equipment (per student if more than one) \$ _____

Moving Expenses: \$ _____ (only if you moved for a new job or are self-employed.)

Teacher's Credit: \$ _____ (for unreimbursed classroom supplies, materials and education—keep receipts.)

Dependent (Child) Care Credit (care for child 12 or under at the end of 2017, elder or disabled person while you worked or went to school)

Give us copies of the year-end statement or list, for each child/person, the amount, the name and address of the provider and their tax id number if not used last year.

● Available Only If You Itemize: (if you don't know if you itemize, ask your preparer!)

Charitable Contributions:

Cash (includes check and credit card) \$ _____

- Must have bank records **or** receipt and **must** be a qualified charity
- If \$250 or more, **must** have receipt that states: "no goods or services were provided."
- Does not include raffle tickets, dues, political donations or gifts to a person (such as through gofundme)

In kind donations \$ _____ Charitable Miles _____

- Items must be in "good" or better condition
- Must have receipt from organization AND
- Detailed list of items donated with values assigned by you
- If donated through a drop box, no receipt required BUT still need itemized list and maximum is \$250

Property Tax Paid: Primary residence \$ _____ (If Vermont, we need a copy of the bill)

Other property tax \$ _____

Mortgage (home equity) Interest: Please give us a copy of the 1098(s) from the bank.

Have you refinanced or gotten a home equity loan since 1987? _____

If yes, did you use any of the money for something other than to buy or improve your home? _____

Vehicle Tax for MA or NH or CT residents (paid to the town): \$ _____

Medical Expenses: (will only help if you itemize AND they are more than 7.5% of your income. Do **not include expenses paid** through your **Health Savings Account**.)

Health Insurance \$ _____ (don't include Medicare paid through Soc. Sec. or insurance paid through payroll withholding.)

Long Term Care (nursing) Insurance \$ _____

Doctor bills not covered by insurance and co-pays \$ _____

Prescriptions \$ _____

Dental, eye care, hearing aid and batteries, other: \$ _____

Travel and/or lodging for medical treatment \$ _____

(up to \$50 per person per night as long as second person is necessary to transport the patient. No deduction for meals.)

Medical Miles driven _____

Other than health insurance and miles, these do not have to be separated out.

Total \$ _____

● Available only if you itemize AND they are more than 2% of your income:

Union dues (if not on W-2) \$ _____ Job hunting expenses \$ _____

Unreimbursed Employee Expenses: (NOT business expenses if you work for yourself.)

Uniforms \$ _____ Uniform Laundry \$ _____ (actual expense or \$50/year)

Education \$ _____ Travel \$ _____ Professional License \$ _____ Other _____