

Schedule A - Itemized Deductions (December 2016)

Complete only if you think your total itemized deductions might exceed the IRS standard deduction for your filing status.

2016 Standard Deduction			
Filing Status	Standard Deduction	Add	Add for Blind and/or Over 65
Married Filing Jointly or Widow(er)	\$12,600	+	\$1,250
Single	\$6,300	+	\$1,550
Head of Household	\$9,300	+	\$1,550
Married Filing Separately	\$6,300	+	\$1,250
Medical Expenses			
Deductible only if net cost exceeds 10% of Adjusted Gross Income (AGI)			
Note: Does <i>not</i> include amounts paid for or reimbursed by insurance or health insurance premiums paid with pre-tax income			
Did you pay medical expenses for a person you cannot claim as a dependant? If yes, ask your tax preparer	Y	N	
Hospitalization and Health Insurance Premiums - Include after-tax amounts paid or withheld at work			
Medicare Insurance Premiums Paid (Form SSA-1099)			
Long-Care Insurance Premiums			
Vision Insurance			
Dental Insurance			
Prescribed Drugs and Insulin			
Doctors and Clinics			
Dentists and Orthodontists			
Glasses, Contact Lenses, Eye Exams, Laser Eye Surgery			
Hospitals, Nurses, Ambulance			
Nursing or Long-Term Care Facility			
Medical Transportation (taxi, bus, ambulance, etc.)			
Other (please detail)			
Other (please detail)			
Medical Miles Driven:			
Parking:			
Lodging while obtaining Medical Treatment - Limited to \$50 per night, per person			
Medical Expenses Total:			
Taxes			
State and Local Income Taxes Withheld			
State and Local Income Taxes Paid in 2016 for 2016 Tax Year			
State and Local Income Taxes Paid in 2016 for Prior Tax Years			
State and Local Sales Tax Paid for Major Purchases (motor vehicles, boats, airplanes, homes or home building materials, if rate same as general sales tax rate).			
Real Estate Taxes - Homestead (less special assessments)			
Other Real Estate Taxes (second home, cabin, etc...)			
Property Tax Refund			
Special Assessments - Interest Portion Only			

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		Taxes Total:	
Casualty Loss			
Auto Accident, Fire, Theft, Storm, etc. Deductible only if your combined net loss after insurance claim exceeds 10% of AGI, (10% floor doesn't apply to losses from a federally declared disaster. Provide details.			
Interest Paid		Primary Residence	Secondary Residence
*First Mortgage Interest	*Provide Forms 1098		
*Second Mortgage			
*Home Equity/Home Improvement Loan			
Load Points			
Points Amortization			
Mortgage Insurance Premiums Paid on Policies Issued After 2006			
Seller Financed Mortgage			
Name:		SSN:	
Address:			
Investment Interest Paid			
Interest on a boat or recreation vehicle that has basic living accommodations may be deductible as home mortgage interest.			
		Interest Paid Total:	
Donations			
Monetary donations must be substantiated by a bank record (such as a cancelled check) or a written receipt from the organization receiving the donation. The written receipt must include the organization's name and the date and amount of the donation. Use separate sheet if needed.			
Cash, Check, or Credit Card		Include payroll deductions	
Churches or Synagogues			
United Way			
Volunteer Firemen			
Other:			
Other:			
Other:			
Other:			
Out-of-Pocket Expenses for Charitable Work			
Noncash:			
Fair Market Value of Items Given to Charities <i>If over \$500, provide documentation</i>			
If a vehicle, boat or airplane donation over \$500, provide Form 1098-C			
Charitable Miles:		mi	
Other			
		Donations Total:	

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Miscellaneous		
Deductible only if total exceeds 2% of AGI		
Unreimbursed employee business expenses (for example, union dues, tools and supplies, special uniforms and safety equipment, professional dues and subscriptions, job-related education) List items on separate sheet.		
Job Seeking Expenses in Same Field:		
Travel		
Meals		
Employment agency Fees		
Resume		
Other		
Investment Expenses:		
Phone/Postage/Supplies for Investments		
Safe Deposit Box		
Investment Publications and Journals		
IRA and Keough Fees You Paid Directly		
Other		
Tax Prep, Financial Planning/Consultation Fees		
Gambling Losses <i>Limited to Total Gambling Winnings</i>		
Other:		
Other:		
Other:		
Other:		
Other:		
Other:		
Medical Expenses Total:		