

# Tax checklist 2023 - itemized deductions (Schedule A)



## Medical and dental expenses

Health insurance premiums paid (for taxpayer, spouse and dependents)	\$	Long-term care premiums	\$
Medicare premiums	\$	Miles driven for medical purposes	
<b>Out-of-pocket expenses</b>			
Doctors	\$	Long-term care services	\$
Prescription medicines	\$	Medical equipment and supplies	\$
Hospital services	\$	Dental	\$
Laboratory services	\$	Hearing aids	\$
Nursing services	\$	Vision including glasses & contacts	\$

## Taxes paid (federal deduction maximum is \$10,000)

Real estate taxes	\$	State and local income taxes	\$
General sales tax (high value purchases)	\$	Personal property taxes	\$

## Charitable contributions (proof required by the IRS)

Church (statement for donations >= \$250)	\$	Non-cash donations to Goodwill (thrift value)	\$
Monetary donations to charities	\$	Miles driven for charitable purposes	

### For non-cash donations in excess of \$500:

Description of items		Value of items	\$
Organization name		EIN	
Address			

## Mortgage interest (provide Forms 1098)

Principal residence	\$	Mortgage insurance premiums	\$
Second home	\$	Points paid	\$
Equity loans (used to improve homes)	\$	Other (specify)	\$

## Miscellaneous deductions (rare)

Gambling losses	\$	Unrecovered pension investments	\$
Federal estate tax	\$	Impairment-related work expenses	\$
Investment expenses related to income	\$	Ordinary loss debt instrument	\$
Loss from other activities from Schedule K-1	\$	Excess deduction on termination	\$
Casualty losses (federally declared disasters)	\$	Claim repayments	\$

## Professional and employment (deductible on some state returns only)

Safety equipment, tools, supplies	\$	Courses and seminars	\$
Uniforms and protective clothing	\$	Dues paid to professional organizations	\$
Books, subscriptions	\$	Union dues	\$