

## Tax Client Schedule A Info

Fill out COMPLETELY or check  "N/A". Include any back-up documents under Scan Coversheet

### Medical Expenses

#### Current Year

Medical & Dental Expenses \$ \_\_\_\_\_

Medical Insurance Premiums Paid \$ \_\_\_\_\_

Long Term Care Premiums \$ \_\_\_\_\_

Yes  No Fed Deductible?  Yes  No State Deductible?  Yes  No Not Qualified but Grandfathered Deductible?

Prescription Drugs and Medications \$ \_\_\_\_\_

Medical Miles Driven (1-1 to 6-30/7-1 to 12-31) \_\_\_\_\_/\_\_\_\_\_

### Tax Expenses\*

#### Current Year \* Effective 1/1/2018, Total Tax deduction limited to \$10,000

State/Local Income Taxes Paid

(Other Than those on W-2s, 1099s, Etc.) \$ \_\_\_\_\_

2021 State Income Taxes Paid in 2022 \$ \_\_\_\_\_

Real Estate Taxes \$ \_\_\_\_\_

Personal Property Taxes \$ \_\_\_\_\_

Qualified New Vehicle Taxes \$ \_\_\_\_\_

Additional State or Local/Taxes \$ \_\_\_\_\_

Other Taxes: \_\_\_\_\_ \$ \_\_\_\_\_

### Interest Expense

#### Current Year

Home Mortgage Interest reported on form 1098 \$ \_\_\_\_\_ Include Form under Scan Cover Sheet

Date Mortgage Contracted\* \_\_\_\_\_ (Only needed for jumbo mortgages over \$750,000)

Date Mortgage Closed\* \_\_\_\_\_ (Only needed for jumbo mortgages over \$750,000)

Home Mortgage Interest paid to others \$ \_\_\_\_\_

HELOC Interest Used for Home Improvement \$ \_\_\_\_\_

Refinancing Points Paid in 2022 \$ \_\_\_\_\_

Investment Interest (other than K-1) \$ \_\_\_\_\_

Yes  No Would you like to learn how to pay off your mortgage early?

### Contributions

#### Current Year

Cash Contributions \$ \_\_\_\_\_  Y  N Includes GoFundMe \$?

If yes, how much of this amount \$ \_\_\_\_\_

Non-Cash Contributions \$ \_\_\_\_\_ over \$500 include documentation

Volunteer Mileage Driven \_\_\_\_\_

### Casualty & Theft Losses – Related to Federally-declared Disaster ONLY

If you had any casualty or theft losses during the year, please provide detail below: Including date, description, amount of casualty or loss, any insurance reimbursement and basis in the property.

\_\_\_\_\_  
\_\_\_\_\_