

Goldman Accounting, LLC
Schedule A – Itemized Deductions Checklist

- ❑ Medical expenses are only deductible if they exceed 7.5% of income – if so, please list separately the following and the corresponding totals: self-pay insurance premiums, doctor/hospital out-of-pocket costs, dental, eyecare, prescriptions, etc. (only those costs actually paid during the year are relevant)
- ❑ Real estate taxes – bring mortgage statement or if not listed, bring tax receipts for last half 2022 and first half 2023
- ❑ Personal property taxes – bring vehicle registration slips or list
- ❑ Sales tax paid on any motor vehicle, trailer, or home improvements – bring sales tax receipt
- ❑ Mortgage and home equity interest – Form(s) 1098. Please list all original loan dates, original principal amounts, and all uses of the loan funds for all mortgages and refinances that are currently outstanding.
- ❑ 2nd home interest (vacation homes, qualifying boats or campers) – bring interest statement from bank
- ❑ Refinanced mortgage or new mortgage? – bring settlement statement
- ❑ Charitable contributions – cash contributions are not deductible unless you have a statement or receipt issued from the charitable organization. Special information is required for any non-cash donation that exceeds \$500 (please call to ask)

This list is not intended to be all inclusive, please address any changes or information not listed with me.
All income is taxable regardless of amount.
All income is taxable even if not reported to you on a Form W-2 or Form 1099.