

## IFA Taxes Itemized Deduction Data Gathering Worksheet

**Client Name**

**Co-Client Name**

Medical and Dental Expenses	Amount
Prescriptions	
Doctors, dentists, and nurses	
Hospitals and nursing homes	
Insurance premiums	
Long-term care premiums	
Out of pocket lodging and transportation	
Number of medical miles	

### State and Local Taxes Paid

State Income Taxes	Amount
Paid with 2017 extension	
Paid with 2017 state return	
Paid for prior years/other states	

**Attach record of payment to document checklist**

Real Estate and Personal Property Taxes Paid	Amount
Real Estate - Principal Residence	
Real Estate - Investment Property	
Personal Property (Ex: DMV fees)	

**Attach statements to document checklist**

### Interest Paid

Home Mortgage Interest and Points - Lender	Amount
Investment Interest - Broker/Custodian	

**Attach statements to document checklist**

## Charitable Contributions

Cash		
Name of Organization	Date	Amount

**\*Client to maintain bank record or written communication from qualified organization (written communication required if over \$250)**

Volunteer Expenses	Date	Amount

**\*Client to maintain record (receipt or letter) from qualified organization**

Number of Charitable Miles Driven	Miles

**\*Client to maintain records**

Noncash Contributions		If multiple items for clothing or furniture estimates for Fair Market Value, Amount Purchased For, and Date of Purchase. If a Publicly Traded Security is donated please provide exact dates and amounts			
Name of Organization	Description of Property	Date Donated	Fair Market Value	Amount Purchased For	Date of Purchase

**\*Client to maintain record (receipt or letter) from qualified organization**

## Miscellaneous Deductions - For State Tax Returns Only

Category	Amount
Union and Professional Dues	
Tax Return Preparation Fees	
Safe Deposit Box Rental	
Investment Expenses - (Advisor Fees)	
Estate Planning	
Unreimbursed Employee Business Expenses - List Below	

**\*Client to maintain record (receipt or letter) from qualified organization**