

Name of the Taxpayer:

**2019 Individual Taxpayer Organizer****Itemized Deductions Worksheet**

<b>Medical Expenses</b>				<b>Charitable Contributions.</b> If over \$500 in noncash charitable contributions, provide details of contributions. New rules require that the taxpayer retain documentation for all cash contributions.				
Dentists	\$	Hospitals	\$	Cash		\$		
Doctors	\$	Insurance	\$	Noncash contributions (FMV). Clothing or household items must be in good used condition or better.		\$		
Equipment	\$	Prescriptions	\$	Did you transfer funds from an IRA directly to a charity? Yes No		\$		
Eyeglasses	\$	Other	\$	Charitable mileage				
Medical miles: _____ @ 20¢				<b>Casualty and Theft Losses</b>				
<b>Taxes Paid.</b> Do not include taxes paid for full or partial business or rental-use property, including business use of the home.				If you suffered any sudden, unexpected damage or loss of property, or a theft, provide details to your tax preparer. Yes No				
State withholding		<i>Reported on W-2</i>		<b>Other Miscellaneous Deductions.</b> The following deductions are not subject to a 2% of income limit.				
State estimated taxes—paid in 2019		\$		Gambling losses		\$	Federal estate tax on IRD	\$
Real estate tax—residence		\$		Impairment-related expenses		\$	Loss from box 2, K-1, Form 1065B	\$
Real estate tax—other		\$						
Personal property taxes		\$						
Property tax refund—received in 2019		\$ ( )						
Foreign tax paid		\$						
Other		\$						
Other		\$						
Balance paid in 2019 from prior year returns (do not include interest or penalties)		\$						
Did you keep receipts for sales tax paid during 2019?		Yes No						
Did you purchase a car, plane, boat, or home in 2019?		Yes No						
Sales tax paid \$		Purchase paid \$		Date				
<b>Interest Paid.</b> Do not include interest paid for full or partial business or rental-use property, including business use of the home. Provide all Forms 1098 or lender information and ID numbers.								
Main home	\$	Equity loan	\$					
Second home	\$	Equity loan	\$					
Points	\$	Investment interest	\$					
Did you pay a mortgage insurance premium when you purchased your home? Amount \$				Date				

**Other Deductions or Questions**


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- Notes:**
- Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses.
  - Work clothing is not deductible if adaptable for every day wear. Exception for safety equipment, such as steel-toe boots.
  - Legal expenses are deductible only if related to producing or collecting taxable income.
  - Expenses to enable individuals, who are physically or mentally impaired, to work are generally deductible.

**Adjustments Worksheet**

Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum \$250 each.	\$
Health savings account deduction (HSA).	\$
Self-employed SEP, SIMPLE, and qualified plans. Some contributions for 2019 may be made in 2020.	\$
Self-employed health insurance deduction. Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.	\$
Penalty on early withdrawal of savings.	\$
IRA deduction. For traditional IRAs. Roth IRAs are not deductible. Some contributions for 2019 may be made in 2020.	\$
Student loan interest deduction. Paid for taxpayers and dependents. Income limits apply.	\$
Tuition and fees deduction. Qualified tuition and fees if not claiming education credits. Income limits apply.	\$
Moving expenses. Job-related move and at least 50 mile increase in commuting distance.	Ask preparer
Business expenses of reservists, performing artists, and fee-based government officials.	Ask preparer