



GENERAL PURPOSE TAX DEDUCTION CHECKLIST

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2024 TAX YEAR

TAXPAYER(S) NAME(S)

STREET ADDRESS OR PO BOX

BEST CONTACT PHONE

CITY, STATE AND ZIP CODE

BEST CONTACT EMAIL

Memberships (California only)

Union Dues per year

Other Associations

TOTAL DUES & MEMBERSHIP

Public Safety Retirees health insurance premiums paid out-of-pocket.

Total amount paid in 2024

Charitable Contributions of Money

By law, you must have either a cancelled check, a credit card receipt or a letter from the charity showing the date of each donation and the amount in order to deduct money-purely cash donations for which no receipt is issued cannot be deducted

TOTAL MONEY CONTRIBUTIONS

Charitable Contribution of Property

Contributions under \$250 require a receipt from the charity or records containing the date and type of the donation. For donations of a fair market value over \$250 you must have a receipt. All donations should be photographed and a list of donated items must be retained with the source of the valuation of the property- DO NOT JUST "GUESS" A VALUE - if your value is not supported it will not be allowed by the IRS

Charity

Fair Market Value

TOTAL NON-MONEY CHARITABLE CONTRIBUTIONS

Job Related Education (CA ONLY)

Tuition paid minus reimbursement

School Books & Supplies

Describe course of study - read footnote below

1 Job related education means the instruction maintains or improves required skills of your present job, and does not qualify you for an entry level license or certificate. The FTB has been very strict in this area recently. For example, the FTB will disallow a law enforcement management degree if you cannot show you were in some kind of leadership capacity while attending school.

DEPENDENT INFORMATION NEW DEPENDENTS ONLY

New dependent(s) this year? Yes No

#1 SSN

NAME

DOB

RELATIONSHIP

#2 SSN

NAME

DOB

RELATIONSHIP

NAMES OF PERSONS WHO ARE NO LONGER DEPENDENTS IN 2024:

Child Care Information

(PLEASE USE PAGE #7 IF MORE SPACE IS NEEDED)

NO CHILD CARE EXPENSE

Do you participate in Dependent Care Benefits (pre-tax through payroll)?

Yes No

Provider # 1 Name

If provider # 1 is new:

TAX ID

Address

City Zip

Telephone

Amount paid to provider #1

Amount paid per child to provider #1

Name Amount

Provider #2 Name

If provider # 2 is new:

Tax ID

Address

City Zip

Telephone

Amount paid to provider #2

Amount paid per child to provider #2

Name Amount

FOREIGN BANK ACCOUNTS

Name of country or countries where foreign account are held:

Check here if you have no foreign bank accounts

Did the average total balance of all foreign bank accounts exceed \$10,000 in 2024? YES NO

IF YOUR BANK ACCOUNT FOR DIRECT DEPOSIT OF ANY REFUND HAS CHANGED SINCE LAST YEAR – CHECK HERE

Total Medical Expenses Paid (only amounts exceeding 7.5% of adjusted gross income are deductible*-

do not include pre-tax insurance premiums deducted from wages)

Total Property Taxes Paid (do not include rentals)

Deductible DMV Fees (Only the Vehicle License Fee is deductible)

Total Student Loan Interest Paid

Alimony paid \$_____

Date of Alimony Order

Mortgage Interest Paid on your 1st and 2nd residences- may be houses/timeshares/ Boats with cabins/ RVs (do not include rentals)

Lender Amount

Did you have a discharge of debt through bankruptcy in 2023?

YES NO

IRA CONTRIBUTIONS - This is not referring to any 457/401(k)/403(b) deduction from wages.

TAXPAYER

SPOUSE

TRADITIONAL
ROTH

TRADITIONAL
ROTH

TOTAL MORTGAGE INTEREST ON 1st & 2nd HOMES

NEW CLIENTS ONLY

Last years tax preparation costs -

State tax refunds from prior years received in 2024

State tax paid for prior years in 2024

Tuition Paid Out of Pocket for College Level Non-Job Related Education

Note: children must be dependents to be eligible for the credit. Note: be sure to include the amount actually paid during the year and not the amount billed. **WE MUST HAVE A COPY OF FORM 1098-T** The school must be eligible for federal financial aid programs - many trade schools do not qualify. If you did not receive a Form 1098-T in the mail then the student probably has to download a copy.

Name

Amount/Code

Student Status - Box 8?

Box 9?

Indicate if these boxes are checked on each Form 1098-T

THE IRS REQUIRES WE HAVE A COPY OF FORM 1098-T

ADDITIONAL TAX DEDUCTIONS NOT LISTED ELSEWHERE ON THE CHECKLIST

Before completing this section please see below for items which are not deductible

ITEM	DATE PURCHASED	COST	PERCENTAGE OF BUSINESS USE ²
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TOTAL ADDITIONAL EXPENSES

NOTES AND COMMENTS