

State Sales Tax: If we will use tax table amount, *please leave blank* \$ _____
Real Estate Tax: We need to know the "Net Amount" of Real Estate or
 (Do not include Property Taxes **paid by you**, or **paid for you** out of an
 garbage pick-up) escrow account during tax year. \$ _____

Interest Expenses

Mortgage Interest: Non-business interest expenses are deductible only on interest paid on your first or second home and home equity loans to **BUY, BUILD or SUBSTANTIALLY IMPROVE** the residence. You will need to determine what portion of your home mortgage interest is deductible if you **did not** use **all** of the funds to buy, build or substantially improve the residence. We will need all 1098s.

_____ \$ _____ _____ \$ _____
 _____ \$ _____ _____ \$ _____

Charitable Contributions

⇒ **(You should keep a statement or receipt for any contribution.)**
 Charitable Contributions are deductible in full by those who itemize their personal deductions.
Please list below your CASH or CHECK contributions that you are able to substantiate:

_____	\$ _____	Church	\$ _____
_____	\$ _____	United Way	\$ _____
_____	\$ _____	Salvation Army (Checks)	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

⇒ Please list below the "**Fair Market Value**" of **Property (or "stuff")** contributed in 2020. If a total of \$500.00 or more, provide documentation and details on a separate sheet of paper.
(Note: You need to keep a detailed list of all items donated along with your receipt)

Goodwill Industries	\$ _____	Salvation Army (Goods)	\$ _____
Other	\$ _____	_____	\$ _____

Please list below your Out-of-Pocket Expenses

Charitable Mileage: _____ Other: _____

Miscellaneous Expenses

⇒ Fully deductible "Miscellaneous Expenses" such as: GAMBLING LOSSESE up to the amount of winnings; etc.

