

MISCELLANEOUS OTHER INFORMATION:

IRA/SEP Contributions- Have you already made or do you want to consider a contribution to an IRA or SEP?

Yes _____ No _____ Amount to contribute? Taxpayer _____ Spouse _____
Please indicate type: Traditional IRA Roth IRA SEP

College Education- If a member of your family attended college at least one semester in 2023, please provide all 1098T forms **and the college transcript of charges and payments.**

Foreign Accounts and Assets: did you have authority over any foreign bank account or any foreign assets, holdings or gifts from a foreign source?

Cancellation of Debt- Did you have any debt cancelled during 2023? Please provide 1099-C Amount \$ _____

Alimony Paid or Received- If divorced prior to 2019 the new law changed nothing. Amount Received \$ _____

Recipients Name _____ SS# _____ Amount \$ _____

Health Insurance- Did you have marketplace insurance that issued a 1095A form. If you are self employed family health insurance premiums are deductible on your Schedule C. Amounts Paid \$ _____

Contributions to Ms 529 college plans- Did you make any contributions in 2023 for a Ms deduction?

Amount \$ _____

Health Savings Plans (HSA)- Did you personally contribute to the plan? Amount \$ _____ If there were any distributions, provide the form 1099SA. Was all the distributions used for medical expenses? Yes _____ No _____

Jury Duty or Prizes and Awards: Do you have any other income to report not on an official form? Including bartering or trading of services outside of your family.

ITEMIZED DEDUCTIONS- If you are filing single you need >\$12.5K file married joint you need > \$25K of these deductions:

Medical and Dental Expenses - Expense not reimbursed are deductible above 7.5% of your adjusted gross income ...

Doctors, Dentist, Nurses, Laboratory, X-Rays, Hospital

Prescription medicine, Insulin

Hearing Aids, Eyeglasses, Contact Lenses, Dentures

Medical Dental and Vision Insurance premiums (NOT those deducted PreTax, Cafeteria Plans or small employer plans)

Medical miles to and from appointments, parking expense and lodging for out of town care.

Tax Expense – Real Estate Taxes, Personal Property tax on Auto tag.

Interest Expense – Interest paid to a Mortgage Company please provide the 1098 form, if the interest was paid to an

individual please provide the Name _____ Address _____ SS# _____.

Points to purchase your new home? Please provide the HUD closing stmt if not on you 1098form

Investment Interest on you broker statement are also deductible.

Contributions – Church, Not for Profit Charities (You should have a cancelled check, receipt or written communication from the charity on file for each single contribution over \$250. For Donated GOODS you need a written list of to whom, what and fair market value of the items donated. If over \$500 is donated you need a statement from the charity with their address and EIN#.

CASH/CHECK Donations	_____	\$ _____	_____	\$ _____
Donations	_____	\$ _____	_____	\$ _____
Donations	_____	\$ _____	_____	\$ _____

DONATED PROPERTY	_____	SS# _____	Amount \$ _____
	_____	SS# _____	Amount \$ _____