

## Medical Expense

Health/Medical/Dental Insurance Premiums	\$
Medicare Insurance Premiums (w/h from Soc. Sec.)	
Prescription and Medicare (no "over the counter" drugs)	
Doctors/Dentist/Braces	
Hospital/Nursing Home/Nursing Care	
Psychotherapy, Psychological Counseling	
Glasses, Contacts, Hearing Aids, Batteries, etc.	
Lab and X-Ray (not included with the above)	
Equipment, Supplies, Rentals, etc.	
Auto Medical Travel (Miles)	
Parking Fees, Taxi, Bus, Ambulance, etc. (for medical reasons)	
Phone Calls to Dr.'s, Hospital, etc. (toll charges)	
Other	
Insurance Reimbursement (only for amounts listed above)	

## Taxes Paid

Real Estate - Home & Other Property (Do not include rentals)	\$
Vehicle License Fees (1) (2) (3)	
(4) (5) (6)	
Personal Property Tax (Boat, Plane, ect.)	
State Disability Insurance (Calif.)	
State Income Tax Paid - from W-2's, and from 1099's	
Balance Due on Last Year's State return	
Extension Payment on Last Year's State Return	
Payment on a Prior Year's State Return or Adjustment	
Prior year's 4 Qtr. State estimate paid in Jan. this year	
Sales Tax paid on vehicle purchase	

## Residential Mortgage Interest Paid

To an Institution: 1st Trust Deed (**)	\$	\$
2nd Trust Deed (**)		
Line of Credit (**)		
Loan Points		

To an Individual  
 Individual's Identification Number \_\_\_\_\_  
 Individual's Name \_\_\_\_\_  
 Address \_\_\_\_\_

(\* ) It is advisable to have copies of the closing statements available for the purchase refinance/new loan if it occurred this year

(\*\* ) Amounts should agree with Form 1098. If the amounts shown DO NOT coincide with Form 1098 issued by the mortgage lender, check here \_\_\_\_\_. If Form 1098 was issued in another's Social Security #, enter that person's name and SS#:

## Charitable Contributions

	Amount
Any gift \$250.00 or more requires documentation from charity	\$
Cancer Fund/United Way/Heart, Lung, etc.	
Churches/Temples, etc.	
Payroll Deductions	
Red Cross/Hurricane Katrina	
University, Public TV, Telethons	
Miscellaneous	
Non-Cash Contributions:	

Goodwill Industries	
Salvation Army	
Other (If Auto Donation, Provide 1098-C)	

**MISCELLANEOUS BUSINESS & INVESTMENT EXPENSES**

Do not Enter Expenses You Have Listed Elsewhere	Taxpayer	Spouse
Attorney Fees (protect taxable income)	\$	\$
Business Gifts		
Dues: Union and Professional		
Employment Related Education/Seminars		
Tuition/Fees		
Books/Supplies/Parking		
Travel (Miles)		
Entertainment & Meals		
Gambling Losses-Only To Extent of Winnings		
Investment Expenses-Publications & Journals		
Travel (Miles)		
Licenses,Fees, Credential, Etc.		
Investment Account Management Fees		
Publications, Books, Etc., Used in Business		
Safe Deposit Box		
Tax Preperation and Consulting Fees		
Telephone, Fax, Pager (business calls only)		
Tools, Supplies, Equipment		
Uniforms - Purchase and/or Cleaning		
Other		
TOTAL	-	-
SUBTOTAL		