

Deductions: CHECK MARKS ARE NOT DEDUCTIBLE. PUT YOUR FIGURES IN THE PROPER PLACE.

Schedule A: These are your personal deductions

Medical and Dental Expenses (Expenses for yourself, spouse, children and other relatives (even if they don't live with you.) Combine all totals for one figure next to each question. If a Joint return - add all medical on one form - DO NOT SEPARATE.

	Prescriptions
	Health Insurance Premiums (Paid by you – will be on your check stub) Includes – health, HSA, disability, heart, cancer, AFLAC, dental, vision, etc.
	Long Term Care insurance premiums (Nursing home and Home Health Care Insurance)
	Doctor's, dentist's, and practitioner fees (includes chiropractor) (Your co-pays for out of pocket expenses)
	Hospitals, clinics, and medical facility fees
	Lab and X-ray fees
	Eyeglasses, contact lenses, contact care solution, etc.
	Medical equipment and supplies prescribed by the doctor
	Birth control (male and female)
	Mileage for all medical for the year (local and out of town)
	Lodging expenses up to \$50 per person per night for overnight travel
	Other medical and dental expenses or equipment
	Fitness fees prescribed by doctor for health maintenance
	Durable medical equipment prescribed by doctor – hot tub, treadmill, etc.

Sales Tax

The tax program gives you an amount based on your income total. Additional sales tax for unordinary purchases – such as, Furniture, Appliances, Vehicles, Etc.

[illegible]

Real Estate Taxes – bring your property tax statements

	Your main residence
	Additional property, land or time shares

Mortgage Interest – bring your mortgage interest statements

	1 st Mortgage
	2 nd Mortgage
	Additional Mortgage Information
	Mortgage Insurance Premiums (Box #5 on the mortgage statement – this is not your property insurance for the house and fire))
	Closing costs on new home purchase – bring the closing papers – NOT ALL THE COSTS ARE DEDUCTIBLE – BRING THE CLOSING PAPERS

Gifts to Charities – cash donations – amount on left – name of charity on right

All donations must have receipts to be accepted by the IRS.

GoFundMe is not deductible.

Very important – donate to Goodwill, American Council of the Blind, Catholic Family Charities, Savers, etc. (Clothing, furniture, toys, etc.) AND GET RECEIPTS \$\$\$\$
BRING YOUR RECEIPTS

Child Care – You will need a receipt from the provider. The receipt must contain:

Name of Organization / or Person doing the day care

Complete address

EIN or Social Security number for the individual provider

Phone number

School Expenses

School loans – bring the forms (1098E) – not a picture on your phone

1098 T and expenses - Must Have the 1098T in your hands.

	Bring the 1098T for you, your spouse or dependent children
	Expenses – supplies, books, backpacks, computers, software, equipment, lab fees
	Parking fees, room and board,
	Tutoring
	Uniforms
	Transportation fees

This list will get you started – sometimes other factors may give you a tax deduction. The only dumb question is the one that you don't ask. So, ask that question – it MAY be deductible.

Questions you may have:

1. Do I need to make an appointment?
 - Yes
2. May I bring my children with me?
 - No – distractions may cause a mistake on your tax return
3. How much do you charge?
 - Prices are on the first page of the website. www.cranfordent.com
 - After October 15 the current year tax return becomes a previous year tax return. All previous year tax returns are \$400 and up
4. How long will my session last?
 - Depends on if you have this checklist completed and if you have all your forms. A normal session is one hour. Some may take 2 hours.
5. Are you able to do all forms for my tax return?
 - In most cases, yes. I have not had any exceptions yet.
6. How long will my refund take?
 - Normally a week to 10 days, but the IRS says 21 days if no problems with your tax refund.
7. I don't have copies of social security cards for my children, what now?
 - I will need proof that the child is your child. A previous tax return with their name and social security number will work, otherwise you will need to get a letter from the social security office.
8. Do you have my previous information from previous years?
 - Yes, but we need all information updated every year.
9. I forgot a form on my tax return, what do I do?
 - You may need to do an amended return – price starts at \$300 – discounts do not apply to an amended return.
10. What if I don't do the checklist and fill in my figures?
 - You can choose to pay regular price, use the standard deduction or take a chance on re-scheduling. Of course, I most likely won't re-schedule you.

FOLLOW INSTRUCTIONS – FILL IN THIS FORM WITH YOUR FIGURES.

11. You did not do my tax return last year. Will you do this year's tax return for me?
 - I am no longer taking new customers and if you skip a year you become a new customer. So, in other words – NO.