

# List of Deductible Items

Round cents to the nearest dollar (Ex: \$58.50 = \$59.00; \$58.49 = \$58.00)

Tax Year: 2019

**Geoffrey, Johns & Associates, LLC**

200 E. Court St., # 510, Kankakee, IL 60901

815-939-0675

5th Floor of the Kankakee Public Library Building

Executive Centre Entrance

Name: \_\_\_\_\_

<b>Adjustments to Income</b>	
Traditional IRA Contributions*	
Roth IRA Contributions*	
Alimony Paid (Expense)	
Alimony Received (Income)	

<b>Medical and Dental Expense</b>	
(Only include amounts NOT reimbursed by insurance)	
Prescription Drugs	
Doctors, Dentists, and Nurses	
Hospitals and Nursing Homes	
Health Insurance Premiums	
Medicare Premiums Part B & D	
Long Term Care Premiums - You	
Long Term Care Premiums - Spouse	
Hearing Aid	
Orthopedic Shoes	
Other Items:	
Eyeglasses, Contacts, etc.	
Lab Fees, Nursing Care, etc.	
Medical Lodging & Transportation:	
- Lodging Expenses	
- Medical Miles Driven	
_____ miles x .20¢ =	
<b>Total Medical</b>	

<b>Taxes</b>	Federal	State
Estimated Tax Payments:		
- First Quarter (4/15/19)		
- Second Quarter (6/17/19)		
- Third Quarter (9/16/19)		
- Fourth Quarter (1/15/20)		
Real Estate Taxes	1st Pmt	2nd Pmt
Real Estate - Main Home		
Real Estate - 2nd Home		

<b>Interest Paid</b>	
Home Mortgage	
Home Equity Loan	
Deductible Points	
Investment Interest Expense	
<b>Total Interest Paid</b>	

<b>Other Deductions</b>	
Required Educator Expenses**	

\*Maximum contributions to Traditional and Roth IRA:  
 Under age 50 = \$6,000  
 Age 50 and older = \$7,000

\*\*Maximum Expense is \$250.00

<b>Contributions - See Front Page Reminder</b>	
Cash Contributions: List Names of Churches, Missions and Charitable Organizations Below:	
<b>Total Cash Contributions</b>	
Non-cash Contributions (Thrift Shop Value)	
Clothes	
Household items	
Other	
Volunteer Out-of-Pocket Expenses	
Volunteer Mileage	
_____ miles x .14¢ =	
<b>Total Contributions</b>	

- What You Will Need to Bring to Your Tax Meeting:**
- ALL W-2s.
  - ALL 1099s.
  - ALL 1098s.
  - If adding a dependent we need their SSN and date of birth.
  - Real Estate tax statements.
  - Closing/HUD statements for homes bought/sold in 2019.
  - If you think you'll get a refund and you want it directly deposited into your bank account, bring in your bank account number and bank routing number.
  - Paperwork for personal vehicles purchased in 2019 showing the sales tax paid.
  - College expenses paid and student loan interest paid.
  - Add any previously unreported income, like tips or cash bonuses, that have not already been taxed.
  - Add the totals you paid per child for unreimbursed child care expenses. You will need the name, address and tax ID number of the child care provider.
  - If you bought or sold investment properties, bring the paperwork that was issued when you purchased the investment property showing the purchase price.
  - If you made a payment to, or withdrew from, a retirement plan bring in the related paperwork.
  - If you made qualified energy improvements to your residence, bring in your receipts.
  - If your spouse, parent, dependent, or other person for whom you file taxes has died during the tax year, bring in their documents listed above and a copy of their death certificate.

Please add your receipts and enter the totals in the boxes provided above.

Please keep business expenses separate from personal expenses.