

Schedule A – Itemized Deductions

CLIENT _____ TAX YEAR _____

The purpose of this worksheet is to help you organize your tax deductions. In order for an expense to be deductible, it must be considered an “ordinary and necessary” expense. You may include other applicable expenses.

DO NOT include expenses for which you have been **reimbursed, expect to be reimbursed, or are reimbursable.**

Pascarella & Pyrch-Bowlan Accounting Group, LLC’s staff will still need all the supporting documentation.

Medical & Dental (examples)

Doctor	
Prescription Drugs	
Hospital Insurance	
Hospital & Emergency	
Lab & X-Ray	
Nurses	
Dental	
Glasses & Contact Lenses	
Hearing Aids & Batteries	
Orthopedic Shoes	
Therapy Treatments	
Canes/Crutches/Braces	
Wheelchairs	
On Doctor’s Advice	
Air Conditioning	
Vaporizers	
Thermometers & Bandages	
Other	
Medical Miles Driven	
Other Medical Transportation	
Total	

Charitable Contributions

Church	
College	
United Way	
March of Dimes	
Heart Fund	
Seals – Christmas & Easter	
Cancer Society	
Red Cross	
Muscular Dystrophy	
CARE	
Mental Retardation	
Salvation Army	
YMCA, YWCA	
Multiple Sclerosis	
Crippled Children	
Cerebral Palsy	
Value of Furniture or Clothing	
Volunteer Work Expenses	
Church, Scouts, Etc.	
Auto Miles Driven	
Other	
Total	

Taxes Paid

Real Estate Taxes	
Personal Property Taxes	
Auto Tags & Registration	
State Income Taxes	
Sales Taxes – Large Purchases	
Total	

Interests Paid

Home Mortgage Interests	
2 nd Mortgage/Home Equity	
Home Mortgage to Individuals	
Name:	
SSN:	
Address:	
Points Paid at Closing	
Investment Interests	
Total	

Casualty Losses

Accident, Fire & Theft	
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Misc. and Employee Business Expenses

Uniform Cleaning	
Work Tools	
Union Dues	
Safety Shoes and Gloves	
Tax Return Preparation	
Safe Deposit Box	
Investment Expenses	
Education Expenses	
Moving Expenses	
Total	

Employment/Job Seeking Fees	
Sales/Entertainment	
Other-in-Home Expenses	
Business Travel	
Out-of-Town/Temporary	
Vehicle Use (Auto, Truck) Miles	
For Work (Not Commute)	
2 nd Job	
Total	

Other Information
