Deductions & Adjustments

RELIABLE TAX

Rules require that the taxpayer must retain all documentation to substantiate each deduction listed below

Medical Expenses
Include cost for dependents — do not include any expenses that were reimbursed by insurance.

Prescriptions	$
Doctors and copays	$
Dentists	$
Hospitals and nursing homes	$
Insurance premiums	$
Long-term care insurance - Taxpayer	$
Long-term care insurance - Spouse	$
Eyeglasses or contacts	$
Hearing aids and batteries	$
Other:	$
Other:	$
Medical miles driven	

For Oregon filers, if age 66 or older, how much of the above expenses were paid for:	Taxpayer	Spouse
Total medical expenses	$	$
Medical miles driven		

Charitable Contributions

Cash	$
Noncash contributions (FMV) *Clothing or household items must be in good condition*	$
If over $500 in noncash charitable contributions, provide details of each contribution: date, name/address of charity, items donated, value, and original purchase price	
Did you transfer funds from an IRA directly to a charity? ☐ Yes ☐ No	$
Volunteer expenses	$
Charitable miles driven	
Oregon Cultural Trust *Do not include in Cash total above*	$
Political contributions *For use on an Oregon State return only*	$

Taxes Paid *Do not include fees, interest, or penalties*

Property tax - residence	$
Property tax - other	$
Other:	$
Other:	$
Foreign tax paid	$
Art Tax paid	$

Estimated Taxes Paid

Date Paid	Federal	State _____
	$	$
	$	$
	$	$
	$	$
	$	$

Extension Payment *submitted on or before 4/15*

	$	$

Interest Paid

Main home	*Provide copies of all Forms 1098 (and closing disclosure statement if the loan originated last year)*
Second home	
Equity loan	
Mortgage Insurance Premiums	
Points	
Investment interest	$
RV or boat (w/ living quarters) interest	$

Other Deductions and Adjustments	Taxpayer	Spouse
IRA Contributions	$	$
Roth IRA Contributions	$	$
SEP IRA	$	$
Simple IRA	$	$
Student Loan Interest	$	$
Educator Expenses	$	$
HSA Contributions *not paid through payroll*	$	$