



San Dimas, Long Beach, Valencia, Palmdale, Irvine

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PROFESSIONAL MEDICAL DEDUCTIONS

Union/Dues

License Fees _____
Medical Board Fees _____
Professional Associations _____
Professional Insurance _____
Union Dues (POA/DSA) _____
Other _____

Books & Subscriptions

Dictionary/Spellchecker _____
English/Spanish Books _____
Professional Journals _____
Professional Textbooks _____
Professional Software _____
Thomas Guide/Map Book _____
Thesaurus _____
Other _____

Education Expenses

Auto Miles Driven _____
Books/Paper/Pens _____
Hotel/Motel _____
Parking Fees/Valet _____
Student Loan Interest _____
Tuition/Lab Fees _____
of overnight stays _____
Other _____

Professional Conferences

Air Fare _____
Conference Fees _____
Ground Transport _____
Hotel/Motel _____
Other _____

Job Seeking Expenses

Auto Miles Driven _____
Air Fare _____
Hotel/Motel _____
Postage _____
Resumes/Transcripts _____
of Overnight Stays _____
Other _____

Uniforms/Clinical Clothing

Boots/Shoes _____
Dry Cleaning _____
(only non-street wear – lab/clinical)
Gloves/Leather/Latex _____
Jacket/Parka _____
Jump Suit _____
Logo T-Shirts/Caps _____
Pants/Skirts/Blouses _____
Patches _____
Rain Gear _____
Tailoring/Alterations _____
Other _____

Tools & Supplies

Answer Machine/Service _____
Briefcase/Duty Bag _____
Camera/Film _____
Day-Timer/Planner _____
Ear/Eye Protection _____
Flashlight & Charger _____
Gloves/Protection _____
Safety Glasses _____
Tape Recorder/Tapes _____
Other _____

Miscellaneous

Cellular Phone/Fees _____
Business Use of Cell _____%
Desktop Computer _____
Business Use of Comp. _____%
Laptop Computer _____
Pager Fees/ Toll Calls _____
PDA _____
Printer _____
Safe Deposit Box _____
Other _____

Business Mileage

1st Location (miles per wk) _____
2nd Location (miles per wk) _____
Dry Cleaners (miles per wk) _____
Local CME _____
Job to Job _____
Range (miles per wk) _____
Temporary Work _____
Other _____

Contributions

Cash to Charity _____
House of Worship _____
Non-Cash Donations _____
Payroll Deductions _____
Station/Unit Funds _____
Traditional IRA (not ROTH) _____
Other _____

Volunteer (Out-of-pocket + miles)

Church/PTA _____
Community Athletic Groups _____
(Baseball, Football, Soccer, etc.)
Government Organizations _____
Qualified Charities _____
Other _____

Property/ Vehicles

Boat/Trailer/Motorcycle _____
DMV Auto License Fees _____
Equity Line _____
Home Mortgage Refi Points _____
Mortgage Interest _____
Motor Home _____

2nd Home Interest _____
Property Taxes _____
State Taxes Owed and Paid from
prior years tax liabilities _____
Prior Refi Points _____
(deductible when loan paid off)
Other _____

FOR NEW CLIENTS ONLY

Last Year's State Tax Refund _____
Last Year's Tax Prep Fee _____

TIPS FOR TAX SEASON

1. Please, review "Other Possible Deductions/ Income" list. (This document is designed to help remember all necessary documents.)

2. If you **sold stocks**, bring the following for *each transaction*:

- Buy date & sale date
- Buy price & sale price

3. If you **refinanced**, bring all mortgage statements (1098's) from the old and new mortgage companies.

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