



San Dimas, Long Beach, Valencia, Palmdale, Irvine

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## PROFESSIONAL TEACHING DEDUCTIONS

### Union/Dues

Professional Associations \_\_\_\_\_  
 License Fees \_\_\_\_\_  
 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 Books \_\_\_\_\_  
 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/Lab Clothing

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

### Tools & Supplies

Batteries/Bulbs \_\_\_\_\_  
 Binoculars \_\_\_\_\_  
 Brasso/WD-40 \_\_\_\_\_  
 Briefcase/Satchel \_\_\_\_\_  
 Camera/Film \_\_\_\_\_  
 Cleaning Supplies \_\_\_\_\_  
 Day-Timer/Planner \_\_\_\_\_  
 Flashlight & Charger \_\_\_\_\_  
 Gloves/Protection \_\_\_\_\_  
 Locks/Locker Supplies \_\_\_\_\_  
 Notebook/Pens/Paper \_\_\_\_\_  
 Printing/Copies \_\_\_\_\_  
 Software \_\_\_\_\_  
 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

1<sup>st</sup> Location (miles per wk) \_\_\_\_\_  
 2<sup>nd</sup> Location (miles per wk) \_\_\_\_\_  
 Local Conference \_\_\_\_\_  
 Local Workshop \_\_\_\_\_  
 Job to Job \_\_\_\_\_  
 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 \_\_\_\_\_  
 2<sup>nd</sup> 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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