

Schedule A Organizer - Itemized Deductions

Will you have itemized deductions that exceed the standard deduction for 2024? Please review the information below to see if you will be claiming the standard deduction OR claiming itemized deductions.

The 2024 standard deduction for each filing status is: \$14,600 for Single / \$21,900 for Head of Household / \$29,200 for Married Filing Jointly & Surviving Spouse / \$14,600 for Married Filing Separately

Please Note: The additional standard deduction for those older than the age of 65 or for the blind is an extra \$1,550 per individual. However, it increases to \$1,950 if you are in that group AND filing Single.

Please note that you should only include OUT OF POCKET EXPENSES in this section.

TOTAL paid for health, dental, & vision INSURANCE PREMIUMS:

NOTE: Insurances paid through your employer or social security should not be listed here.

TOTAL paid for long term care INSURANCE PREMIUMS:

NOTE: Not health insurance; LTC insurance covers care in nursing homes, nurses, etc.

TOTAL for all MEDICAL MILES driven during the year:

NOTE: Include travel and lodging costs for medical travel.

TOTAL paid for medical, dental & vision EXPENSES:

NOTE: Estimate your total income and multiply by .075 to see if your AGI exceeds 7.5%.

TOTAL paid for all REAL ESTATE TAXES:

NOTE: Estimate your total income and multiply by .075 to see if your AGI exceeds 7.5%.

TOTAL paid for all MORTGAGE INTEREST (Form 1098):

NOTE: Only include primary residence and property not used for business or rentals.

ON BACK - List TOTALS for all CHARITABLE DONATIONS paid IN CASH:

ON BACK - Provide us with the following for EACH NON-CASH CHARITABLE DONATION:

1) Description of the item donated, 2) Date the item was donated by you, 3) Fair Market Value of the donated item on the date of donation, 4) Name of the charitable organization that you donated it to.

NOTE - Please provide backup copies of Forms 1098 & Real Estate Tax Bills

CASH Donations:

NON-CASH Donations:

Comments:
