

SCHEDULE A ORGANIZER – ITEMIZED DEDUCTIONS

2025 DEDUCTION INFORMATION

Will you have itemized deductions that exceed the standard deduction for 2025?

Please review the information below to determine whether you will be claiming the standard deduction or itemizing deductions.

The 2025 standard deduction amounts for each filing status are as follows:

- **Single:** \$15,750
- **Head of Household:** \$23,625
- **Married Filing Jointly & Surviving Spouse:** \$31,500
- **Married Filing Separately:** \$15,750

Please Note:

The additional standard deduction for taxpayers age 65 or older or for those who are blind is:

- **\$2,000** per individual if you are Single or Head of Household
- **\$1,600** per individual if you are Married (including Surviving Spouse)

OUT OF POCKET MEDICAL EXPENSES WORKSHEET

Please note: You should only include OUT OF POCKET EXPENSES in this section:

Health, Dental, Vision Insurance Premiums

Total Paid in 2025: _____

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

Long Term Care Insurance Premiums

Total Paid in 2025: _____

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

Medical Miles Driven During the Year

Total Driven in 2025: _____

Medical Travel and Lodging Costs

Total Paid in 2025: _____

Medical, Dental, Vision Expenses

Total Paid in 2025: _____

(NOTE: use the calculator below to determine if your AGI exceeds 7.5%)

$$\frac{\text{Total Income}}{\text{Total Income}} \times .075 = \text{_____}$$

Use the calculator above to determine if your AGI exceeds 7.5%

Please continue the worksheet by flipping over to the back of this page:

REAL ESTATE AND PERSONAL PROPERTY TAXES

Real Estate Taxes

Total Paid in 2025: _____

Personal Property Taxes

Total Paid in 2025: _____

MORTGAGE INTEREST

Mortgage Interest from Form 1098

Total Paid in 2025: _____

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

Mortgage Interest NOT Reported on Form 1098

Total Paid in 2025: _____

CHARITABLE DONATIONS PAID IN CASH

Charitable Organization: _____

Total Given in 2025: _____

Charitable Organization: _____

Total Given in 2025: _____

Charitable Organization: _____

Total Given in 2025: _____

Charitable Organization: _____

Total Given in 2025: _____

Charitable Organization: _____

Total Given in 2025: _____

NON-CASH CHARITABLE DONATIONS

Charitable Organization: _____

Item Description: _____

Date of Donation: _____

Fair Market Value: _____

Charitable Organization: _____

Item Description: _____

Date of Donation: _____

Fair Market Value: _____