



# Itemizing: Welcome to the Schedule A

**Tax Route**

A DIVISION OF HOFFLERSMITH, INC.

**Tax Guide Series**



Itemizing (or listing items on your schedule A form), allows you as the taxpayer to claim more than the standard deduction and ultimately reduce your taxes. Some of the categories are listed below. If the total amount of your itemized deductions are over the IRS threshold amount then you'll be allowed to claim these deductions on your return. If the total itemized deductions is less than the IRS threshold then then you will not be able to itemized, and the standard deduction amount will be used instead. Your tax professional can explain this further and help you identify &/or prepare the documents you need.

## **FOR HOMEOWNERS**

- Mortgage Interest Statement (Form 1098)
- Real Estate Taxes

## **CONTRIBUTIONS**

- Charitable Contributions (Cash and Non-Cash)
- Offerings at church
- Items donated to Goodwill, etc.
- Car Donations

## **MEDICAL EXPENSES**

- Uncovered Hospital Expenses
- Rx's
- Glasses
- Co-pays
- Diabetic supplies
- Lab or x-ray fees
- Ambulance costs

## **WORK EXPENSES FOR THOSE WHO RECEIVE A W-2**

- Un-reimbursed Employment— Job Related Expenses (i.e. Uniforms, scrubs, dry cleaning, fees for licenses, union dues, tools, equipment, etc.)

\*\*\*Ask for our list of **Un-reimbursed Employee Expenses**, if applicable