

Your 2023 Itemized Deduction Worksheet

*Itemized Deductions need to be more than your standard deduction.
\$13,850 for singles, \$20,800 for heads of household and \$27,700 for married couples.
These deductions will not help you if you do not have enough deductions to itemize.*

Other worksheets are available for Self-Employed Business, Farm or Rental Expenses.
If a section does not apply to you, please cross it out or write N/A next to it.

Medical Expenses: Do not include any expenses deducted from your W2 gross income (e.g. group health insurance plans), any expenses that were reimbursed by insurance, or insurance premiums paid thru Social Security). To be deductible, these expenses must be more than 7.5% of your total income. Include costs for dependents.

Prescriptions	\$ _____	Eyeglasses & Contact Lenses	\$ _____
Health Insurance (not medicare)	\$ _____	Medical Miles	_____ miles
*LTC Insurance (his)	\$ _____	Ambulance Fees	\$ _____
*LTC Insurance (hers)	\$ _____	**Lodging - see below	\$ _____
Doctors & Dentists	\$ _____	Medical-Use Equip./Supplies	\$ _____
Hospitals & Clinics	\$ _____	Hearing Aids	\$ _____
Lab & X-ray	\$ _____		
Nursing Home	\$ _____		

< Only the medical portion of the cost which is usually 100%
*Long Term Care (LTC) insurance premiums: **Medical lodging \$50 per person per night away for medical purposes.
WA State PFML also applies if YOU pay for it (not your employer). Bring your yearend paystub if you're not sure.

Personal Taxes (State & Local tax paid is only deductible up to \$10,000)

Total Sales Tax Paid: *Optional - ONLY sales tax paid, not the full price) \$ _____

*The IRS offers a standard deduction for Sales Tax Paid based on income.

Sales Tax on Motor Vehicles \$ _____

...includes new (not used) cars, light trucks, motor homes and motorcycles.

Non-Business Auto, Truck, Trailer Registration RTA Fees \$ _____

Regional Transit Authority fees only. Business-related auto expenses go on the Vehicle Worksheet.

Labor & Industries withheld from pay \$ _____

This is not on your W2. Please ask your employer or provide Year-End Paystub.

Real Estate Tax paid \$ _____

NOT interest or penalties on unpaid tax, TV or irrigation tax. Provide stmts.

If you can't find them, then print them out at <http://okanoganwa.taxsifter.com>.

Mortgage Interest & Insurance -

Please provide 1098s or year-end statements for interest paid on anything with a toilet and sleeping quarters.

Note on the 1098 or statement what the interest was paid on (e.g. Boat, Home, Rental, Office, RV, Farm, etc.)

Limited to \$750,000 total. Home Equity loan interest is not decuctible unless secured by your home and used to improve it.

Contributions - Receipts are required to be on file for all donations. Note: Your TIME is not deductible.

Church & Charities (cash/cks) \$ _____ Non-Cash Contributions: \$ _____

Charitable Miles Driven \$ _____ Purchases for Non-Profits: \$ _____

Volunteer Expenses \$ _____ < Must be directly connected to volunteer work, including travel costs.

Note on Non-Cash contributions: For deductions over \$500, please attach a list itemizing description, date of each donation and what you could sell it for today (FMV). For any one contribution over \$5000, an appraisal is required as well.

Other - The following must exceed 2% of income to be a benefit.

Gambling Losses \$ _____ (deductible only to extent of winnings with a detailed written record)

