

Community Tax & Financial - 2018 Personal Tax Return Checklist

Deductions & Credits Available Without Itemizing

State Renter's Deduction

College Expenses

\$	Amount of Rent Paid	\$	Tuition
	Number of Months Rented	\$	Required Fees, Equipment, Supplies & Books
	Landlord's Name & Address	\$	Grants or Scholarships Received
		\$	Contributions to Indiana CollegeChoice 529
		\$	Withdrawals from a 529 plan or ESA
		\$	Room & Board
		\$	Student Loan Interest

Adjustments to Income

Energy Credits

\$	Educator Expenses for Teachers	\$	Solar Energy Systems
\$	Health Savings Account (not payroll deduct)	\$	Solar Water Heating
\$	Traditional IRA or SEP Contributions	\$	Small Wind Energy
\$	Roth IRA Contributions	\$	Geothermal Heat Pump
\$	Childcare Expenses	\$	Qualified Fuel Cell Property
	- Provider Name, Address, Tax ID#	\$	Qualified Plug-in vehicle

Do you have a repayment of a 1st Time Homebuyer Credit taken in 2008?

Itemized Deductions

Taxes Paid

Interest Paid

\$	Property Taxes	\$	Home Mortgage 1st
\$	Auto #1 County Excise	\$	Home Mortgage 2nd
\$	Auto #2 County Excise	\$	Home Equity Interest
\$	Motorcycle County Excise	\$	PMI (Private Mortgage Insurance)
\$	Personal Property Tax-Trailer/RV	\$	Points Paid at Purchase (not Refi)
\$	Personal Property Tax-Boat	Loans before 2018 >\$1M?	
\$	Amount of state tax owed last year, if any	Loans after 2017 >\$750k?	

Miscellaneous Deductions

Charitable Contributions

****Only available to Armed Forces Reservists, Qualified Performing Artists, Fee-based State Gov't Officials, & Impairment related work expenses.**

****For non-cash donations over \$500 the IRS needs to know the date of donation, the value on the date of donation, and the original purchase price and date.**

\$	Union Dues	\$	Tithe
\$	Tools for work	\$	Missions
\$	Safety Shoes, Glasses, Equipment	\$	United Way
\$	Specialty Work Uniforms	\$	March of Dimes
\$	Unreimbursed Job Expenses	\$	MDA
		\$	American Cancer Society
		\$	Universities

Medical Expenses

\$	Private Health Insurance Premiums	\$	Other
\$	Deductibles & Copays		Mileage
\$	Prescriptions		
\$	Eye Glasses		
\$	Dental	\$	Limited to Winnings Reported
\$	Long Term Care Ins Premiums - Taxpayer		
\$	Long Term Care Ins Premiums - Spouse		
\$	Overnight Lodging for Medical Reasons		
	Mileage		

Gambling losses