

Community Tax & Financial - 2023 Personal Tax Return Checklist

Deductions & Credits Available Without Itemizing

State Renter's Deduction

\$	Amount of Rent Paid
	Number of Months Rented
	Landlord's Name & Address

College Expenses

\$	Tuition
\$	Required Fees, Equipment, Supplies & Books
\$	Grants or Scholarships Received
\$	Contributions to Indiana CollegeChoice 529
\$	Withdrawals from a 529 plan or ESA
\$	Room & Board
\$	Student Loan Interest

Adjustments to Income

\$	Educator Expenses for Teachers
\$	Health Savings Account (not payroll deduct)
\$	Traditional IRA or SEP Contributions
\$	Roth IRA Contributions
\$	Childcare Expenses
	- Provider Name, Address, Tax ID#

Energy Credits (Must Include Documentation)

*Visit www.energystar.gov to verify eligibility

\$	Solar Energy Incl. Solar Water Heater
\$	Geothermal Heat Pump
\$	HVAC, Water Heater, Biomass Fuel Stoves
\$	Insulation, Windows, Exterior Doors
\$	Qualified Electric Vehicle

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

Itemized Deductions

Taxes Paid

\$	Property Taxes on Personal Residence
\$	Auto #1 County Excise
\$	Auto #2 County Excise
\$	Motorcycle County Excise
\$	Personal Property Tax-Trailer/RV
\$	Personal Property Tax-Boat
\$	Amount of state tax owed last year, if any

Interest Paid

\$	Home Mortgage 1st
\$	Home Mortgage 2nd
\$	Home Equity Interest used to Improve Home
\$	PMI (Private Mortgage Insurance)
\$	Points Paid at Purchase (not Refi)
	Loans before 2018 >\$1M?
	Loans after 2017 >\$750k?

Miscellaneous Deductions

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

\$	Union Dues
\$	Tools for work
\$	Safety Shoes, Glasses, Equipment
\$	Specialty Work Uniforms
\$	Unreimbursed Job Expenses

Charitable Contributions

****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.**

\$	Tithe
\$	Missions
\$	United Way
\$	March of Dimes
\$	MDA

Medical Expenses

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

Gambling losses

\$	Mileage
\$	Limited to Winnings Reported