

## Community Tax & Financial - 2024 Personal Tax Return Checklist

### ***Deductions & Credits Available Without Itemizing***

<u><b>State Renter's Deduction</b></u>		<u><b>College Expenses</b></u>	
\$	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
<u><b>Adjustments to Income</b></u>		<u><b>Energy Credits (Must Include Documentation)</b></u>	
\$	Educator Expenses for Teachers	*Visit <a href="http://www.energystar.gov">www.energystar.gov</a> to verify eligibility	
\$	Health Savings Account (not payroll deduct)	\$	Solar Energy Incl. Solar Water Heater
\$	Traditonal IRA or SEP Contributions	\$	Geothermal Heat Pump
\$	Roth IRA Contributions	\$	HVAC, Water Heater, Biomass Fuel Stoves
\$	Childcare Expenses	\$	Insulation, Windows, Exterior Doors
	- Provider Name, Address, Tax ID#	\$	Qualified Electric Vehicle

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

## Itemized Deductions

<u><b>Taxes Paid</b></u>		<u><b>Interest Paid</b></u>	
\$	Property Taxes on Personal Residence	\$	Home Mortgage 1st
\$	Auto #1 County Excise	\$	Home Mortgage 2nd
\$	Auto #2 County Excise	\$	Home Equity Interest used to Improve Home
\$	Motorcycle County Excise	\$	Points Paid at Purchase (not Refi)
\$	Personal Property Tax-Trailer/RV		
\$	Personal Property Tax-Boat	Loans before 2018 >\$1M?	
\$	Amount of state tax owed last year, if any	Loans after 2017 >\$750k?	
<u><b>Miscellaneous Deductions</b></u>		<u><b>Charitable Contributions</b></u>	
**Only available to Armed Forces Reservists, Qualified		**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.	
Performing Artists, Fee-based State Gov't Officials, &			
Impairment related work expenses.			
\$	Union Dues		
\$	Tools for work		
\$	Safety Shoes, Glasses, Equipment		
\$	Specialty Work Uniforms	\$	Tithe
\$	Unreimbursed Job Expenses	\$	Missions
		\$	United Way
		\$	March of Dimes
		\$	MDA
<u><b>Medical Expenses</b></u>		\$	American Cancer Society
\$	Private Health Insurance Premiums	\$	Universities
\$	Deductibles & Copays	\$	Other
\$	Prescriptions	\$	Other
\$	Eye Glasses		Mileage
\$	Dental		
\$	Long Term Care Ins Premiums - Taxpayer		
\$	Long Term Care Ins Premiums - Spouse		
\$	Overnight Lodging for Medical Reasons		
	Mileage for medical care	\$	<u><b>Gambling losses</b></u> Limited to Winnings Reported