

Please: CHECK BOX THAT YOU HAVE NO FOREIGN BANK OR INVESTMENT ACCOUNTS FOR ENTIRE YEAR

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MEDICAL EXPENSES

PRESCRIPTIONS DRUGS	
HEALTH INSURANCE PREMIUMS Supplemental	
DOCTORS, DENTISTS & OTHER MEDICAL	
LONG TERM HEALTH CARE PREMIUMS	
TRAVEL EXPENSES	
AUTOMOBILE MILEAGE	
PARKING & TOLLS	

TAXES

Don't Fill Out if Included on 1098 Mortg Form

REAL ESTATE TAXES	
REAL ESTATE TAXES	
REAL ESTATE TAXES	
PERSONAL PROPERTY TAX	

MORTGAGES - Not Reported on Form 1098 Mortgage Statements

Don't Fill Out if you received 1098 Mortg Forms.

	Name of Lender	
MORTGAGE		
MORTGAGE		
MORTGAGE		
MORTGAGE		
INVESTMENT LOANS		
LOAN POINTS (Even if paid by seller)		YEARS

DATE OF MORTGAGE REFINANCE AND # OF YEARS * / /2023

* Please send copy of two page settlement sheet ONLY

Don't Fill Out If You Provide IRA Statements Reporting Contributions

IRA CONTRIBUTIONS

\$6500 Maximum under age 50 - contribution must be received by IRA no later than 04-15-2024

\$7500 Maximum Age 50+

TRADITIONAL

ROTH

IRA CONTRIBUTIONS - YOURSELF	FOR 2023		
IRA CONTRIBUTIONS - SPOUSE	FOR 2023		

CHILD CARE EXPENSES

You MUST REPORT SS# of CARE PROVIDER TO CLAIM CREDIT

PROVIDER NAME	Provider's Address	Provider's Tax ID #	Amount Paid To Provider	Child's Name