

**Please enter all pertinent 2022 amounts and attach all 1098 forms.  
Last year's amounts are provided for your reference.**

**MEDICAL AND DENTAL EXPENSES**

NOTE: Enter self-employed health insurance premiums on Sheet 24 and Medicare insurance premiums on Sheet 14.

	2022 Amount	TS	2021 Amount
Prescription medicines and drugs .....			
Doctors, dentists and nurses .....			
Hospitals and nursing homes .....			
Insurance premiums not entered elsewhere (excl. LT care & amts. paid w/pre-tax dollars) ..			
Long-term care premiums - taxpayer .....			
Long-term care premiums - spouse .....			
Insurance reimbursement (enter as a positive number) .....			
Lodging and transportation:			
Out-of-pocket expenses .....			
Medical miles driven .....			
Other medical and dental expenses:			
_____			
_____			
_____			

**TAXES PAID** (State and local withholding and 2022 estimates are automatic.)

State income taxes - 1/22 payment on 2021 state estimate .....			
State income taxes - paid with 2021 state return extension .....			
State income taxes - paid with 2021 state return .....			
State income taxes - paid for prior years and/or to other state .....			
City/local income taxes - 1/22 payment on 2021 city/local estimate .....			
City/local income taxes - paid with 2021 city/local extension .....			
City/local income taxes - paid with 2021 city/local return .....			

**SALES AND USE TAXES PAID**

State and local sales taxes (except autos and special items) .....			
Use taxes paid on 2022 purchases .....			
Use taxes paid with 2021 state return .....			
Sales tax on autos not included above .....			
Sales tax on boats, aircraft, other special items .....			

**OTHER TAXES PAID**

Real estate taxes - principal residence:			
_____			
Real estate taxes - held for investment :			
_____			
_____			
Personal property taxes (including auto fees in some states. Provide a copy of tax notice) ...			
Foreign income taxes .....			
Other taxes:			
_____			

2022

1040

US

Itemized Deductions (continued)

25 p2

Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

INTEREST PAID

Home mortgage int. (Box 1) and points (Box 2) reported on Form 1098:

2022 Amount

TS

2021 Amount

Table with 3 columns: Description, 2022 Amount, 2021 Amount. Includes rows for home mortgage interest and points.

Home mortgage interest not reported on Form 1098:

Form for payee information: Payee's name, SSN or FEIN, street address, city, state, ZIP code, region, postal code, country.

Table for amount paid: Description, 2022 Amount, 2021 Amount.

Points not reported on Form 1098:

Table for points not reported: Description, 2022 Amount, 2021 Amount.

Mortgage insurance premiums on post 12/31/06 contracts (Box 4) . . . . .

Table for mortgage insurance premiums: Description, 2022 Amount, 2021 Amount.

Investment interest (interest on margin accounts):

Table for investment interest: Description, 2022 Amount, 2021 Amount.

Passive interest . . . . .

Table for passive interest: Description, 2022 Amount, 2021 Amount.

NOTE: Points paid on loans other than to buy, build, or improve your main home are deductible over the life of the mortgage. For these types of loans also provide the dates and lives of the loans.

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Churches, schools, hospitals, and other charitable organizations (60% limitation):

Contributions by cash or check:

Table for cash contributions: Description, 2022 Amount, 2021 Amount.

Volunteer expenses (out-of-pocket) . . . . .

Number of charitable miles . . . . .

Table for volunteer expenses and miles: Description, 2022 Amount, 2021 Amount.

Veterans' organizations, fraternal societies, nonprofit cemeteries, and certain private nonoperating foundations (30% limitation):

Contributions by cash or check:

Table for cash contributions: Description, 2022 Amount, 2021 Amount.

Volunteer expenses (out-of-pocket) . . . . .

Number of charitable miles . . . . .

Table for volunteer expenses and miles: Description, 2022 Amount, 2021 Amount.

2022

1040

US

Itemized Deductions (continued)

25 p3

Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

NONCASH CONTRIBUTIONS

NOTE: Use Sheet 26 if total noncash contributions are over \$500. No deduction is allowed for contributions of clothing and household items that are not in good used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

50% limitation (see above):

2022 Amount

TS

2021 Amount

Three horizontal lines for 50% limitation entries.

Table with 3 columns: 2022 Amount, TS, 2021 Amount. 3 rows.

30% limitation (see above):

Three horizontal lines for 30% limitation entries.

Table with 3 columns: 2022 Amount, TS, 2021 Amount. 3 rows.

30% capital gain property (gifts of capital gain property to 50% limit orgs.):

Three horizontal lines for 30% capital gain property entries.

Table with 3 columns: 2022 Amount, TS, 2021 Amount. 3 rows.

20% capital gain property (gifts of capital gain property to non-50% limit orgs.):

Three horizontal lines for 20% capital gain property entries.

Table with 3 columns: 2022 Amount, TS, 2021 Amount. 3 rows.

STATE MISC. DEDS. IF NON-CONFORMING TO TAX CUTS & JOBS ACT (subject to 2% AGI limit)

Union and professional dues

Table with 3 columns: 2022 Amount, TS, 2021 Amount. 1 row.

Other unreimbursed employee expenses (uniforms and protective clothing, professional subscriptions, employment agency fees, and certain edu. expenses):

Five horizontal lines for other unreimbursed employee expenses.

Table with 3 columns: 2022 Amount, TS, 2021 Amount. 5 rows.

Investment expense:

Five horizontal lines for investment expense.

Table with 3 columns: 2022 Amount, TS, 2021 Amount. 5 rows.

Tax return preparation fee

Safe deposit box rental

Table with 3 columns: 2022 Amount, TS, 2021 Amount. 2 rows.

Miscellaneous deductions (2% AGI) (certain legal and accounting fees, and custodial fees):

Five horizontal lines for miscellaneous deductions.

Table with 3 columns: 2022 Amount, TS, 2021 Amount. 5 rows.

25 p3



**If either of the following conditions below apply to you, your home mortgage interest deduction may need to be limited and the input section provided below should be completed. If neither condition applies, enter home mortgage interest amounts on organizer sheet 25 p2.**

1. Total home equity debt exceeded \$100,000 at any time during 2022 (\$50,000 if married filing separate). For this purpose, home equity debt is defined as any mortgages taken out in which the proceeds were used to buy, build, or improve your home.
2. Total home acquisition debt exceeded \$750,000 at any time during 2022 (\$375,000 if married filing separate). For this purpose, home acquisition debt is defined as any mortgages taken out after October 13, 1987 in which the proceeds were used to buy, build, or improve your home.

NOTE: When completing the input section below, grandfather debt represents loans taken out prior to October 14, 1987.

**Please enter all pertinent 2022 amounts and attach all 1098 forms.  
Last year's amounts are provided for your reference.**

	2022 Amount	TS	2021 Amount
Fair market value of the property on the date that the last debt was secured . . . . .			
Home acquisition and grandfather debt on the date that the last debt was secured . . . . .			

**LOAN INFORMATION**

Loan #1

- Lender's name . . . . .
- Form (see table) . . . . .
- Number of form . . . . .
- 1=taxpayer, 2=spouse, blank=joint . . . . .
- Interest paid . . . . .
- Points paid . . . . .
- Total principal paid . . . . .
- Lump sum principal payment (if paid off) . . . . .
- Months outstanding (if not 12) . . . . .
- 1=home acquisition debt incurred after 12/15/17 . . . . .
- Home acquisition debt balance - beginning of year . . . . .
- Home acquisition debt borrowed in 2022 . . . . .
- Home equity debt balance - beginning of year . . . . .
- Home equity debt borrowed in 2022 . . . . .
- Grandfather debt balance - beginning of year . . . . .



Loan #2

- Lender's name . . . . .
- Form (see table) . . . . .
- Number of form . . . . .
- 1=taxpayer, 2=spouse, blank=joint . . . . .
- Interest paid . . . . .
- Points paid . . . . .
- Total principal paid . . . . .
- Lump sum principal payment (if paid off) . . . . .
- Months outstanding (if not 12) . . . . .
- 1=home acquisition debt incurred after 12/15/17 . . . . .
- Home acquisition debt balance - beginning of year . . . . .
- Home acquisition debt borrowed in 2022 . . . . .
- Home equity debt balance - beginning of year . . . . .
- Home equity debt borrowed in 2022 . . . . .
- Grandfather debt balance - beginning of year . . . . .



Form
1 = Schedule A (default)
2 = Business use of home
3 = Schedule E

**Please enter all pertinent 2022 amounts and attach all 1098 forms.  
Last year's amounts are provided for your reference.**

**LOAN INFORMATION (continued)**

Loan #3

**2022 Amount                  TS                  2021 Amount**

- Lender's name.....
- Form (see table).....
- Number of form.....
- 1=taxpayer, 2=spouse, blank=joint.....
- Interest paid.....
- Points paid.....
- Total principal paid.....
- Lump sum principal payment (if paid off).....
- Months outstanding (if not 12).....
- 1=home acquisition debt incurred after 12/15/17.....
- Home acquisition debt balance - beginning of year.....
- Home acquisition debt borrowed in 2022.....
- Home equity debt balance - beginning of year.....
- Home equity debt borrowed in 2022.....
- Grandfather debt balance - beginning of year.....


Loan #4

- Lender's name.....
- Form (see table).....
- Number of form.....
- 1=taxpayer, 2=spouse, blank=joint.....
- Interest paid.....
- Points paid.....
- Total principal paid.....
- Lump sum principal payment (if paid off).....
- Months outstanding (if not 12).....
- 1=home acquisition debt incurred after 12/15/17.....
- Home acquisition debt balance - beginning of year.....
- Home acquisition debt borrowed in 2022.....
- Home equity debt balance - beginning of year.....
- Home equity debt borrowed in 2022.....
- Grandfather debt balance - beginning of year.....


**Form**

1 = Schedule A (default)  
 2 = Business use of home  
 3 = Schedule E