

2017 TAX WORKSHEET (Page 2)

Itemized Deductions:

Medical Expenses: \$

(Must exceed 7.5% of adjusted gross income)

Mortgage Interest: (Enclose Form 1098)

Main Home \$

Other (non-rental) \$

Property Taxes:

Main Home \$

(Tax from escrow will be on Form 1098)

Other (non rental) \$

Charitable Contributions:

Cash \$

Property \$

If property contribution exceeds \$500, IRS requires additional information. Please provide below:

Org. name:

Org. Address:

Contribution date:

Type: (clothing/household etc.)

College Tuition Credit:

(Must include Form 1098-T from College)

Student:

School:

Year of College: 1 2 3 4 Grad

Tuition/Books: \$

Student:

School:

Year of College: 1 2 3 4 Grad

Tuition/Books: \$

Miscellaneous Work Expenses:

Union/Professional Dues: \$

Professional Subscriptions: \$

Uniforms/Safety Shoes: \$

(Do not include civilian clothing)

Uniform Cleaning: \$

Training/Seminars: \$

Safe Deposit Box: \$

Tools/Safety Equipment: \$

Cell Phone: (Business Use) \$

Investment Advisory Fees: \$

Total Business Miles:

(Do not include to and from work)

Other Work Expenses:

NYS Volunteer Firefighter Credit:

Who Qualifies?

Taxpayer

Spouse

Active volunteer firefighter or volunteer ambulance worker for all of the tax year.

Fire Company:

Name:

Address:

Affordable Care Act:

Were you and your family covered by health insurance all year?

Yes No

If not, please list months of non-coverage:

If enrolled in the marketplace, you must enclose Form 1095-A with this form.

Rental Property:

For more detail, please enclose Rental Worksheet available at www.eptax.com

Property Address:

Annual Rent Collected: \$

Property Tax Paid: \$

Mortgage Interest Paid: \$

Insurance: \$

Advertising: \$

Repairs/Maintenance: \$

Cleaning: \$

Utilities: \$

Supplies: \$

Capital Improvements Cost \$

Type: (Roof, windows etc.)

Date Complete: