

## 2018 TAX WORKSHEET (Page 2)

### ITEMIZED DEDUCTIONS:

**Due to 2018 tax reform changes many taxpayers will opt for the increased standard deduction; Joint returns \$24,000/Single \$12,000/HOH \$18,000**

**Medical Expenses:** (include premiums for health care, co-pays, prescriptions and doctor and hospital visits. Must exceed 7.5% AGI) \$

**Medical Mileage:** (Calculated at .18/mile) Total Miles

**Mortgage Interest:** (Include Form 1098 from Bank) Main Home \$

Other Non-Rental \$

**Property Taxes:** (Form 1098 will have escrow) Main Home \$

Other Non-Rental \$

**Charitable Contributions:** (charitable orgs/churches) Cash \$

Property \$

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

Org Name:

Org Address:

Contribution type: (clothes, household goods etc)

Date of contribution:

**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 \$

### 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](http://www.eptax.com)

Property Address:

**Rent Received:** \$

Advertising: \$

Cleaning/Maint. \$

Insurance: \$

Legal/Prof \$

Mortgage Interest \$

Repairs (minor) \$

Supplies: \$

Prop Taxes \$

Utilities: \$

List all Capital Improvements (roof, remodel, water tank, furnace etc) on an attachment with type of improvement, date of improvement, and cost.

Unlike the IRS, NY State announced they will still allow unreimbursed business deductions (union dues, uniforms, tax prep fees, investment and safe deposit fees which exceed 2% of Adjusted Gross Income. However most taxpayers will still do better with the standard deduction. If your itemized deductions will exceed \$16,050-Married joint, \$8,000-Single, or \$11,200-Head of Household, please enter those deductions below or include on a separate attachment if you would like me to do the calculation:
