

2020	1040	US	Itemized Deductions	25
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**Please enter all pertinent 2020 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.

	2020 Amount	TS	2019 Amount
Prescription medicines and drugs	4		
Doctors, dentists and nurses	5		
Hospitals and nursing homes	6		
Insurance premiums not entered elsewhere (excl. LT care & amts. paid w/pre-tax dollars) ..	7		
Long-term care premiums - taxpayer	17		
Long-term care premiums - spouse	58		
Insurance reimbursement (enter as a positive number)	8		
Lodging and transportation:			
Out-of-pocket expenses	9		
Medical miles driven	52		
Other medical and dental expenses:			
_____	10		
_____	10		
_____	10		

TAXES PAID (State and local withholding and 2020 estimates are automatic.)

State income taxes - 1/20 payment on 2019 state estimate	11		
State income taxes - paid with 2019 state return extension	12		
State income taxes - paid with 2019 state return	13		
State income taxes - paid for prior years and/or to other state	14		
City/local income taxes - 1/20 payment on 2019 city/local estimate	211		
City/local income taxes - paid with 2019 city/local extension	212		
City/local income taxes - paid with 2019 city/local return	213		

SALES AND USE TAXES PAID

State and local sales taxes (except autos and special items)	91		
Use taxes paid on 2020 purchases	92		
Use taxes paid with 2019 state return	96		
Sales tax on autos not included above	349		
Sales tax on boats, aircraft, other special items	93		

OTHER TAXES PAID

Real estate taxes - principal residence:			
_____	15		
_____	15		
Real estate taxes - held for investment :			
_____	16		
_____	16		
_____	16		
Personal property taxes (including auto fees in some states. Provide a copy of tax notice) ...	18		
Foreign income taxes	19		
Other taxes:			
_____	20		

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INTEREST PAID

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

	2020 Amount	TS	2019 Amount
_____	21		
_____	21		
_____	21		

Home mortgage interest not reported on Form 1098:

Payee's name.....	85.____	
Payee's SSN or FEIN....	86.____	
Payee's street address..	87.____	
Payee's city.....	88.____	
Payee's state.....	106.____	
Payee's ZIP code.....	108.____	
Payee's region.....	1350.____	
Payee's postal code.....	1351.____	
Payee's country.....	1352.____	
Amount paid.....	22.____	

Points not reported on Form 1098:

_____	23		
_____	23		
_____	39		

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

Investment interest (interest on margin accounts):

_____	24		
_____	24		
_____	27		

Passive interest.....

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:

_____	32		
_____	32		
_____	32		
_____	32		
_____	32		
_____	31		
Volunteer expenses (out-of-pocket)	31		
Number of charitable miles.....	53		

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

Contributions by cash or check:

_____	41		
_____	41		
_____	41		
_____	41		
_____	41		
_____	41		
Volunteer expenses (out-of-pocket)	40		
Number of charitable miles.....	54		

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Itemized Deductions (continued)

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Please enter all pertinent 2020 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):

2020 Amount TS 2019 Amount

Table with 4 columns: Description, 2020 Amount, TS, 2019 Amount. Rows 33-33.

30% limitation (see above):

Table with 4 columns: Description, 2020 Amount, TS, 2019 Amount. Rows 34-34.

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

Table with 4 columns: Description, 2020 Amount, TS, 2019 Amount. Rows 35-35.

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

Table with 4 columns: Description, 2020 Amount, TS, 2019 Amount. Rows 36-36.

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

Union and professional dues

Table with 4 columns: Description, 2020 Amount, TS, 2019 Amount. Row 42.

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

Table with 4 columns: Description, 2020 Amount, TS, 2019 Amount. Rows 43-43.

Investment expense:

Table with 4 columns: Description, 2020 Amount, TS, 2019 Amount. Rows 44-44.

Tax return preparation fee

Table with 4 columns: Description, 2020 Amount, TS, 2019 Amount. Row 45.

Safe deposit box rental

Table with 4 columns: Description, 2020 Amount, TS, 2019 Amount. Row 46.

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

Table with 4 columns: Description, 2020 Amount, TS, 2019 Amount. Rows 47-47.

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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 2020 (\$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 2020 (\$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 2020 amounts and attach all 1098 forms.
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	2020 Amount	TS	2019 Amount
Fair market value of the property on the date that the last debt was secured	493		
Home acquisition and grandfather debt on the date that the last debt was secured	494		

LOAN INFORMATION

Loan #1

Lender's name	820		
Form (see table)	416		
Number of form	417		
1=taxpayer, 2=spouse, blank=joint	496		
Interest paid	401		
Points paid	402		
Total principal paid	404		
Lump sum principal payment (if paid off)	403		
Months outstanding (if not 12)	405		
1=home acquisition debt incurred after 12/15/17	418		
Home acquisition debt balance - beginning of year	407		
Home acquisition debt borrowed in 2020	408		
Home equity debt balance - beginning of year	410		
Home equity debt borrowed in 2020	411		
Grandfather debt balance - beginning of year	413		

Loan #2

Lender's name	830		
Form (see table)	436		
Number of form	437		
1=taxpayer, 2=spouse, blank=joint	497		
Interest paid	421		
Points paid	422		
Total principal paid	424		
Lump sum principal payment (if paid off)	423		
Months outstanding (if not 12)	425		
1=home acquisition debt incurred after 12/15/17	438		
Home acquisition debt balance - beginning of year	427		
Home acquisition debt borrowed in 2020	428		
Home equity debt balance - beginning of year	430		
Home equity debt borrowed in 2020	431		
Grandfather debt balance - beginning of year	433		

<p>Form</p> <p>1 = Schedule A (default) 2 = Business use of home 3 = Schedule E</p>
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Itemized Deductions (continued)

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Please enter all pertinent 2020 amounts and attach all 1098 forms.
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LOAN INFORMATION (continued)

Loan #3

2020 Amount TS 2019 Amount

Lender's name	840		
Form (see table)	456		
Number of form	457		
1=taxpayer, 2=spouse, blank=joint	498		
Interest paid	441		
Points paid	442		
Total principal paid	444		
Lump sum principal payment (if paid off)	443		
Months outstanding (if not 12)	445		
1=home acquisition debt incurred after 12/15/17	458		
Home acquisition debt balance - beginning of year	447		
Home acquisition debt borrowed in 2020	448		
Home equity debt balance - beginning of year	450		
Home equity debt borrowed in 2020	451		
Grandfather debt balance - beginning of year	453		

Loan #4

Lender's name	850		
Form (see table)	476		
Number of form	477		
1=taxpayer, 2=spouse, blank=joint	499		
Interest paid	461		
Points paid	462		
Total principal paid	464		
Lump sum principal payment (if paid off)	463		
Months outstanding (if not 12)	465		
1=home acquisition debt incurred after 12/15/17	478		
Home acquisition debt balance - beginning of year	467		
Home acquisition debt borrowed in 2020	468		
Home equity debt balance - beginning of year	470		
Home equity debt borrowed in 2020	471		
Grandfather debt balance - beginning of year	473		

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