Remedy Tax Services

WORKSHEET 12
HOME AND FAMILY

Itemized deductions organizer

We compare itemizing with the standard deduction and use whichever lowers your tax more. Enter yearly totals for what you paid yourself.

Medical and dental

Only what you paid and were not reimbursed for.

Health insurance paid with after-tax money	$	Doctors, dentists and clinics	$
Hospitals and labs	$	Prescriptions	$
Glasses, contacts and hearing aids	$	Long-term care	$
Medical miles, January to June	$	Medical miles, July to December	$

Taxes you paid

State income tax paid besides withholding	$	Real estate tax on your home	$
Personal property (car) tax	$	Sales tax on a car, boat or home improvement	$

Interest you paid

Mortgage interest (Form 1098)	$	Points paid on a purchase or refinance	$
Mortgage insurance premiums	$	Interest on loans used to buy investments	$

Gifts to charity

Use the Charitable donations log for the detail.

Gifts of money	$	Gifts of goods	$
Volunteer miles	$		

Other

Gambling losses (up to your winnings)	$	Loss from a federally declared disaster	$
	$		$

Also new on 2026 returns

These are separate from itemizing. Tell us if any apply.

Did you pay interest on a loan for a new vehicle bought in 2025 or 2026?	☐ Yes	☐ No
Did you or your spouse turn 65 by the end of the year?	☐ Yes	☐ No
Did you earn tips or overtime pay?	☐ Yes	☐ No
Did you buy a home, refinance or take a home equity loan this year?	☐ Yes	☐ No

Vehicle year, make and model	VIN	Loan interest paid $

Keep it safe. Do not write full Social Security numbers or bank account numbers on this sheet. Give those in person, or upload the documents to your secure client vault. Please do not email this worksheet; upload it at the client portal instead.