## **2023 TAX WORKSHEET** (Page 2) Affordable Care Act: 1095-A **ITEMIZED DEDUCTIONS:** Most taxpayers will opt for the standard deduction; If you or a family member were enrolled Joint \$27,700/Single \$13,850/HOH \$20,800 (+1500 per person for age 65+) in the health insurance marketplace Medical Expenses: (include premiums for health care, co-pays, (Obamacare) for any part of 2023, you prescriptions and doctor and hospital visits. Must exceed 7.5% AGI) must supply the 1095-A received in **Medical Mileage: Total Miles** January from the provider. Your account will have to be reconciled at tax time to Mortgage Interest: (Include Form 1098 from Bank) Main Home determine if any advance premium tax \$ credits received were calculated Other Non-Rental correctly. \$ Main Home Property Taxes: (Form 1098 will have escrow) **Rental Property:** Other Non-Rental For more detail, please enclose Rental \$ Charitable Contributions: Worksheet available at www.eptax.com Cash **Property Address:** Ś **Charitable Mileage:** @ .14 cents per mile Prop If property contribution exceeds \$500, IRS Org Name: requires additional information. Org Address: 2023 purchase/Include Closing Statement Please provide: Contribution type (clothing, **Rent Received:** household goods etc.): Advertising: \$ Date: College Tuition Credit: (Must include Insurance: \$ Form 1098-T from College) Legal/Prof \$ **NYS Volunteer Firefighter Credit:** Mortgage Interest \$ Who Qualifies? Student: Repairs (minor) \$ School: **Taxpayer** Supplies: \$ П Year of College: 1 2 3 4 Grad Spouse **Prop Taxes** \$ Books/Supplies: \$ Active volunteer firefighter or volunteer ambulance worker for all of the tax year. **Utilities:** \$ Student: Fire Company: List all Capital Improvements (roof, School: Name: remodel, water tank, furnace etc) on an attachment with type of improvement, Year of College: 1 2 3 4 Grad Address: date of improvement, and cost. Books/Supplies Unlike the IRS, NY State 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 the deductions below or include on a separate attachment. Also, please provide type and cost of any Residential Energy items purchased in 2023 that meet Energy Star requirements, such as Furnace/AC/Hot Water Tank/ Insulation/Windows/Doors (no appliances). For further info: https://www.irs.gov/newsroom/irs-releases-frequently-asked-questions-about-energy-efficient-home-improvementsand-residential-clean-energy-property-credits