

ESTIMATED TAX PAYMENTS MADE

FEDERAL: '20 Amt Credited to '21: _____			STATE: '20 Amt Credited to '21: _____		
4th Estimate - Prior Year	Date _____	Amount: _____	Date _____	Amount: _____	
Balance Due on 2020 Return	Date _____	Amount: _____	Date _____	Amount: _____	
1st Qtr Estimate	Date _____	Amount: _____	Date _____	Amount: _____	
2nd Qtr Estimate	Date _____	Amount: _____	Date _____	Amount: _____	
3rd Qtr Estimate	Date _____	Amount: _____	Date _____	Amount: _____	
4th Qtr Estimate	Date _____	Amount: _____	Date _____	Amount: _____	

ITEMIZED DEDUCTIONS

(Do not put BUSINESS EXPENSES on this section.)

HEALTH INSURANCE THROUGH MNSURE? Y/N

OUT-OF-POCKET MEDICAL AND DENTAL:

Payments to HSA _____
Withdrawals from HSA _____
Was HSA Distribution all for Medical Y/N _____
Did you participate in cafe/flex plan at work? **YES / NO** _____
Prescriptions (only) _____
Doctors and Dentists _____
Corrective Devices _____
Glasses _____
Transportation (miles) # _____
Other _____
Medical Ins. Premium _____
Medicare Ins. Premium (see 1098)
 Part B _____
 Part D _____
Long-Term Care Insurance _____
Long-Term Care Ins Spouse _____
Nursing Home/Assisted Living _____
1099-LTC Received? _____

TAXES: (non-business) **Please bring your RE Tax Stmt**

RE Tax Primary Residence _____
RE Tax Secondary Residence _____
Property Tax Refund < _____ > August _____
Auto License _____

INTEREST: (non-business)

Mortgage Interest Paid (attach 1098) _____
 What Was It Used For? _____
Mortgage Interest Paid (attach 1098) _____
 What Was It Used For? _____
Interest Paid to Individual for your home
(include amortization schedule) _____
 Name _____
 Address _____
 SSN _____
Home Equity Loan Interest _____
 What Was It Used For? _____
Investment Interest Expense _____
Mortgage Ins Premium _____

CONTRIBUTIONS:

Receipts are required for all contributions.

Church _____
Charity _____
Other _____
MN Non-Game Ck Off _____
Mileage (miles) # _____
Non-Cash/Goodwill _____

EMPLOYEE BUSINESS EXPENSES: (MINNESOTA ONLY)

(Deductible if over 2% of AGI)

Employee Bus Expenses (Form 2106) YES / NO _____
Income Tax Preparation _____
Union Dues _____
Work Uniforms _____
Work Tools Used on Job _____
Chauffeurs License _____
Brokerage Fees _____
Other _____

IRA: (Not Reported on W-2)

Traditional IRA Contributions _____
Traditional IRA Distributions _____
ROTH IRA Contributions _____
ROTH IRA Distributions _____

Gambling/Lottery

Gambling losses are limited to gambling income.

Gambling losses must be documented!

Gambling Losses _____
Gambling Winnings _____

I have reviewed this information and to the best of my knowledge it is true, correct, and complete.

_____ (signature)

_____ (date)