

**REDUCTIONS/ADJUSTMENTS TO INCOME**

Adoption expenses \_\_\_\_\_  
Alimony paid \_\_\_\_\_  
College Savings Plan \_\_\_\_\_  
College Tuition Fees **bring Form 1098-T** \_\_\_\_\_  
Deduction for IRA contribution \_\_\_\_\_  
Educator Expense (up to \$300) \_\_\_\_\_  
Electric Vehicle credit **bring papers** \_\_\_\_\_  
Furnace, AC, or Hot Water heater \_\_\_\_\_  
Geothermal, Wind Turbines, Biomass Fuel Stove  
or Solar \_\_\_\_\_  
Storm Doors, Windows, or Insulation \_\_\_\_\_  
Penalty for early withdrawal of savings \_\_\_\_\_  
Student Loan Interest \_\_\_\_\_

**CHILDCARE**

Sitter's Name \_\_\_\_\_  
Address \_\_\_\_\_  
SS# or EIN# \_\_\_\_\_  
Amount Paid \_\_\_\_\_

Sitter's Name \_\_\_\_\_  
Address \_\_\_\_\_  
SS# or EIN# \_\_\_\_\_  
Amount Paid \_\_\_\_\_

\* Information is needed to claim childcare credit

**UNREIMBURSED MEDICAL**

Health/Hospital Insurance \_\_\_\_\_  
Federal HSA **bring distribution form** \_\_\_\_\_  
Nursing home insurance \_\_\_\_\_  
Nursing Home Expense \_\_\_\_\_  
Marketplace Insurance( **bring Form 1095-A**, return  
cannot be e-filed without it)  
Montana Medical Savings \_\_\_\_\_  
Prescriptions \_\_\_\_\_  
Doctors, Dentist, etc. \_\_\_\_\_  
Glasses, Contacts, Orthro \_\_\_\_\_  
Laser Eye Surgery \_\_\_\_\_  
Medical Travel (Hotel & Air) \_\_\_\_\_  
Medical Mileage \_\_\_\_\_  
Other \_\_\_\_\_

**HOME PURCHASE OR IMPROVEMENT INTEREST**

1<sup>st</sup> OR 2<sup>nd</sup> Home, or 2<sup>nd</sup> Mortgage \_\_\_\_\_  
Refinance **bring closing papers** \_\_\_\_\_  
Sale or Purchase of Residence **bring Form 1099-S/Closing  
and Settlement Papers** \_\_\_\_\_

**TAXES**

Home, Land or Cabin \_\_\_\_\_  
Vehicle **bring slips** \_\_\_\_\_  
MT or Federal taxes paid \_\_\_\_\_  
Land Sale **bring closing papers** \_\_\_\_\_

**CONTRIBUTIONS**

Receipted Church, Charity \_\_\_\_\_  
Non-Cash over \$500 itemize \_\_\_\_\_  
Volunteer Mileage \_\_\_\_\_

**\*\*There are several other NEW MT  
credits/deductions that we will be taking on  
your return based on your age, documents,  
and personal situation so the  
Reductions/Adjustment List is NOT all  
inclusive.**

**ON-LINE INCOME AND SALES**

Crypto Currency **Form 1099-B (i.e., Robinhood).**  
Venmo, Square, Barter/Shared Economy Income,  
Airbnb, eBay, Craigslist, or Marcari **Form 1099-K  
form.**  
Uber/Door Dash **Form 1099-K/1099-NEC or Income  
summary form your online account.**

**AGE 62 & OVER**

Social Security **bring Form SSA-1099** \_\_\_\_\_  
Rent paid **bring receipts** \_\_\_\_\_  
Roommate Income \_\_\_\_\_  
Non-taxable Pensions \_\_\_\_\_  
Property Tax paid  
**bring November bill** \_\_\_\_\_