

**2023 TAXES WORKSHEET
INDIVIDUAL (FORM 1040)**

Name _____

Date _____

Provide the following items in addition to the amounts provided in this worksheet:

- Form(s) 1098 – reports mortgage interest and property taxes
- REB Org Worksheet - Tax Payments

Description	Amount
Property taxes paid not included in mortgage payments – Principal residence	
Sales tax on regular purchases (to claim sales tax instead of state income tax)	
Sales tax on large purchases – autos, boats, etc. (to claim sales tax instead of state income tax)	
Personal property taxes based on value of assets (e.g., tax included in auto registrations)	

You will not need to provide receipts supporting the above amounts (except for Form(s) 1098), but you are required to retain them for your records.

Comments: