

Department of the Treasury  
Internal Revenue Service

(Schedule B is on back)

▶ **Attach to Form 1040.** ▶ See Instructions for Schedules A and B (Form 1040).

Name(s) as shown on Form 1040

Your social security number

**Medical and Dental Expenses**

**(Do not include expenses reimbursed or paid by others.)**

(See Instructions on page 23.)

- 1a** Prescription medicines and drugs, insulin, doctors, dentists, nurses, hospitals, medical insurance premiums you paid, etc. . . . .
- b** Other (list—include hearing aids, dentures, eyeglasses, transportation and lodging, etc.) ▶
- 2** Add lines 1a and 1b, and enter the total here . . . . .
- 3** Multiply the amount on Form 1040, line 32, by 7.5% (.075) . . . . .
- 4** Subtract line 3 from line 2. If zero or less, enter -0-. **Total medical and dental** . . . ▶

1a			
1b			
2			
3			
4			

**Taxes You Paid**

(See Instructions on page 23.)

- 5** State and local income taxes . . . . .
- 6** Real estate taxes . . . . .
- 7** Other taxes (list—include personal property taxes) ▶
- 8** Add the amounts on lines 5 through 7. Enter the total here. **Total taxes** . . . ▶

5			
6			
7			
8			

**Interest You Paid**

(See Instructions on page 24.)

- Note:** *New rules apply to the home mortgage interest deduction. See Instructions.*
- 9a** Deductible home mortgage interest you paid to financial institutions (report deductible points on line 10) . . . . .
  - b** Deductible home mortgage interest you paid to individuals (show that person's name and address) ▶
  - 10** Deductible points. (See Instructions for special rules.) . . . . .
  - 11** Deductible investment interest (see page 24) . . . . .
  - 12a** Personal interest you paid (see page 24) . . . . .
  - b** Multiply the amount on line 12a by 40% (.40). Enter the result . . . . .
  - 13** Add the amounts on lines 9a through 11, and 12b. Enter the total here. **Total interest** ▶

9a			
9b			
10			
11			
12a			
12b			
13			

**Gifts to Charity**

(See Instructions on page 25.)

- 14** Contributions by cash or check. (If you gave \$3,000 or more to any one organization, show to whom you gave and how much you gave.) ▶
- 15** Other than cash or check. (You must attach Form 8283 if over \$500.)
- 16** Carryover from prior year . . . . .
- 17** Add the amounts on lines 14 through 16. Enter the total here. **Total contributions** . . . ▶

14			
15			
16			
17			

**Casualty and Theft Losses**

- 18** Casualty or theft loss(es) (attach Form 4684). (See page 25 of the Instructions.) . . . ▶

18			
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**Moving Expenses**

- 19** Moving expenses (attach Form 3903 or 3903F). (See page 26 of the Instructions.) ▶

19			
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**Job Expenses and Most Other Miscellaneous Deductions**

(See page 26 for expenses to deduct here.)

- 20** Unreimbursed employee expenses—job travel, union dues, job education, etc. (You MUST attach Form 2106 in some cases. See Instructions.) ▶
- 21** Other expenses (investment, tax preparation, safe deposit box, etc.). List type and amount ▶
- 22** Add the amounts on lines 20 and 21. Enter the total. . . . .
- 23** Multiply the amount on Form 1040, line 32, by 2% (.02). Enter the result here . . . . .
- 24** Subtract line 23 from line 22. Enter the result (if zero or less, enter zero) . . . . . ▶

20			
21			
22			
23			
24			

**Other Miscellaneous Deductions**

- 25** Other (from list on page 26 of Instructions). Enter type and amount ▶

25			
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**Total Itemized Deductions**

- 26** Add the amounts on lines 4, 8, 13, 17, 18, 19, 24, and 25. Enter the total here. Then enter on Form 1040, line 34, the LARGER of this total or your standard deduction from page 17 of the Instructions . . . . . ▶

26			
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Name(s) as shown on Form 1040. (Do not enter name and social security number if shown on other side.)

Your social security number

### Schedule B—Interest and Dividend Income

Attachment Sequence No. 08

#### Part I Interest Income

If you received more than \$400 in taxable interest income, you must complete Part I and Part III and list ALL interest received. You must report all interest on Form 1040, even if you are not required to complete Part I and Part III. If you received, as a nominee, interest that actually belongs to another person, or you received or paid accrued interest on securities transferred between interest payment dates, see page 27.

(See Instructions on pages 10 and 26.)

Interest Income		Amount	
1	Interest income from seller-financed mortgages. (See Instructions and list name of payer.) ▶	1	
2	Other interest income (list name of payer) ▶	2	
3 Add the amounts on lines 1 and 2. Enter the total here and on Form 1040, line 8a. ▶		3	

Note: If you received a Form 1099-INT or Form 1099-OID from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

#### Part II Dividend Income

If you received more than \$400 in gross dividends and/or other distributions on stock, complete Part II and Part III. If you received, as a nominee, dividends that actually belong to another person, see page 27.

(See Instructions on pages 11 and 27.)

Dividend Income		Amount	
4	Dividend income (list name of payer—include on this line capital gain distributions, nontaxable distributions, etc.) ▶	4	
5	Add the amounts on line 4. Enter the total here	5	
6	Capital gain distributions. Enter here and on line 13, Schedule D.*	6	
7	Nontaxable distributions. (See Schedule D Instructions for adjustment to basis.)	7	
8	Add the amounts on lines 6 and 7. Enter the total here	8	
9	Subtract line 8 from line 5. Enter the result here and on Form 1040, line 9 ▶	9	

Note: If you received a Form 1099-DIV from a brokerage firm, list the firm's name as the payer and enter the total dividends shown on that form.

\*If you received capital gain distributions but do not need Schedule D to report any other gains or losses, enter your capital gain distributions on Form 1040, line 14.

#### Part III Foreign Accounts and Foreign Trusts

If you received more than \$400 of interest or dividends, OR if you had a foreign account or were a grantor of, or a transferor to, a foreign trust, you must answer both questions in Part III.

(See Instructions on page 27.)

	Yes	No
10 At any time during the tax year, did you have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? (See page 27 of the Instructions for exceptions and filing requirements for Form TD F 90-22.1.)		
If "Yes," enter the name of the foreign country ▶		
11 Were you the grantor of, or transferor to, a foreign trust which existed during the current tax year, whether or not you have any beneficial interest in it? If "Yes," you may have to file Form 3520, 3520-A, or 926		