

DAVID CITY HOUSING AUTHORITY

"Sunshine Court"

1125 3RD STREET * DAVID CITY, NEBRASKA 68632

Telephone (402) 367-3587 Fax (402) 367-3641

Email: sc40406@windstream.net

You must be 62, disabled, or handicapped to qualify for medical deductions.

WHAT I NEED

- Your current Bank Statement.
- A copy of the sheet from Social Security Administration explaining your new benefits for the current year. If you do not have it, you may have to call them and request it. 1-800-772-1213 (You should have gotten this in the mail in December.) A copy of all 1099's from banks or other financial institutions
- Names of all the banks you use.
- If you are employed, a copy of your W-2
- If you have farm income or own land, a copy of State & Federal Income Tax Return
- A copy of your assessed valuation of the land you own.
- List the name, address, and phone number for your drug prescription for the past 12 months. **I will contact them to get your out of pocket expenses.**
- Over the counter medications must be prescribed by your Dr. with note from him/her stating the dosage per day, and the box with number of pills & cost.
- Health Insurance must be verified by a cancelled check w/receipt or a signed statement from your agent.
- List the name, address, and phone number for your clinics, dentist, chiropractic, eye dr. & hospitals that you have used in the past 12 months. **I will contact them to get your out of pocket expenses.**
- If you receive a pension, please bring verification of the amount.

THINGS THAT ARE NOT DEDUCTIBLE

Car insurance

Household insurance

Nursing home insurance

Funeral home policies

Life insurance

Church donations

THINGS I DON'T NEED

Rent receipts from the Housing Authority

Individual prescription receipts (I want computer print outs only)

I do not want a print out from any medical profession/business whether it be for doctor appointments or prescriptions that list any medical information. I will contact them for just the amount you paid out of your own pocket. You only need to list their names, addresses, and phone numbers.

NOTICE: Over the counter medications, vitamins, and herbs must be prescribed by your M.D. You can take any kind of vitamins you like, but only Dr. prescribed are deductible.