

Carryover Worksheet

List of items that will carryover to the 2017 tax return

(Keep for your records)

2016

Name(s) as shown on return

Tax ID Number

Itemized Deductions

Carryover Amount

Contributions subject to 100% of AGI limitations	
Contributions subject to 50% of AGI limitations	
Contributions subject to 30% of AGI limitations (50% capital gains appreciated property)	
Contributions subject to 30% of AGI limitations	
Contributions subject to 20% of AGI limitations (30% capital gains appreciated property)	
Taxable state and local refunds to Form 1040, line 10	
State/local taxes paid in 2017 to flow to the Schedule A	
Preparer Fee to flow to the Schedule A	
State donations and contributions carryover	
State overpayment applied to next year	

Expenses

Office in home operating expenses	
Office in home excess casualty losses and depreciation	
Disallowed investment interest expense AMT	_____ Reg. Tax
Section 179 expense	
Operating expenses, from Form WK_E, Sch E - Rental limitation on deductions when used for personal use	
Excess depreciation, from Form WK_E, Sch E - Rental limitation on deductions when used for personal use	

Losses

Short-term capital loss AMT	_____ Reg. Tax
Long-term capital loss AMT	_____ Reg. Tax
Net operating loss AMT	_____ Reg. Tax
Nonrecaptured net section 1231 losses from WK_1231C AMT	_____ Reg. Tax

Credits

Mortgage interest credit	
Credit for prior year minimum tax	
Foreign Tax credit AMT	_____ Reg. Tax
District of Columbia first time home owner's credit	
Res. energy efficient property credit	

Other

Overpayment applied to next year's estimates	
Estimated Tax Payment 1 _____	Estimated Tax Payment 2
Estimated Tax Payment 3 _____	Estimated Tax Payment 4
Federal tax liability for 2210 calculation	
State tax liability for state 2210 calculation	
IRA basis Taxpayer _____ Spouse	

Passive Activity

At Risk Limitations
