



- Any other 1099s received
- Record of alimony paid/received with Ex-spouse's name and SSN

Types Of Deductions

• Home Ownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements
- All other 1098 series forms

• Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations

- Amounts of miles driven for charitable or medical purposes

• Medical Expenses

- Amounts paid for healthcare insurance and to doctors, dentists, hospitals

• Health Insurance

- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e . an employer, insurance company, government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
- Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

• Childcare Expenses

- Fees paid to a licensed day care center or family day care for care of an infant or preschooler.
- Wages paid to a baby-sitter.

Don't include expenses paid through a flexible spending account at work.

• Educational Expenses

- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you received
- Form 1098-E if you paid student loan interest

• Job Expenses & Tax Prep Fees

- Employment related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax, interest expense, parking)
- Receipts for classroom expenses (for educators in grades K-12)
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Record of moving expenses not reimbursed by employer
- Amount paid for preparation of last year's tax return

• State & Local Taxes or Sales Tax

- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Invoice showing amount of vehicle sales tax paid

• Retirement & Other Savings

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions
- All other 5498 series forms (5498-QA, 5498-ESA)

• Federally Declared Disaster

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information
- Check FEMA site to see if my county has been declared a federal disaster area