



Tax Deduction Checklist

Taxpayer _____ Tax Year _____

This checklist is designed to serve as a reminder of items that may be tax deductible. More information will be required to deduct any of the items listed. It is not all-inclusive, as there are number of additional deductions that may apply, especially in the case of business expenses. If any of these deductions apply to you, please be prepared to provide additional information or documentation for your tax preparation.

- _____ Mortgage Interest
- _____ Property Taxes
- _____ Energy Efficient Home Improvements
- _____ Childcare/Daycare, Care for other Dependents
- _____ Adoption Expenses
- _____ Charitable Contributions (cash or monetary)
- _____ Charitable Contributions (non-cash, clothing, auto, securities, other)
- _____ Energy Efficient Vehicle Purchase
- _____ Student Loan Interest
- _____ College Tuition
- _____ Other educational expenses
- _____ Health Care Spending Account (HSA Contributions)
- _____ Medical Expenses
- _____ Health Insurance Premiums
- _____ Retirement Plan or IRA Contributions
- _____ Teacher (Educator expenses)
- _____ Investment Interest
- _____ Casualties & Theft
- _____ Foreign Income
- _____ Quarterly Estimated Taxes Paid