

# TAX DEDUCTION CHECKLIST

YEAR \_\_\_\_\_

## personal, family & health

<input type="checkbox"/>	Medical and dental expenses	
<input type="checkbox"/>	Health insurance premiums	
<input type="checkbox"/>	Prescription medications	
<input type="checkbox"/>	Vision care (glasses, contacts, exams)	
<input type="checkbox"/>	Charitable donations (cash or goods)	
<input type="checkbox"/>	Childcare expenses	
<input type="checkbox"/>	Adoption expenses	
<input type="checkbox"/>	Student loan interest	
<input type="checkbox"/>	Alimony payments (if applicable)	
<input type="checkbox"/>	Retirement contributions (IRA, etc.)	
<input type="checkbox"/>	HSA or FSA contributions	
<input type="checkbox"/>		
<input type="checkbox"/>		

**Total Personal & Family:**

## home & property

<input type="checkbox"/>	Mortgage interest	
<input type="checkbox"/>	Property taxes	
<input type="checkbox"/>	Home office (if self-employed)	
<input type="checkbox"/>	Energy-efficient home improvements	
<input type="checkbox"/>	Home insurance (rental property/business use)	
<input type="checkbox"/>	Rental property expenses	
<input type="checkbox"/>	Home repairs for rental property	
<input type="checkbox"/>	HOA fees (rental property)	
<input type="checkbox"/>	Landlord expenses (if applicable)	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

**Total Home & Property:**

## work & education

<input type="checkbox"/>	Job-related education or training	
<input type="checkbox"/>	Professional certifications or exams	
<input type="checkbox"/>	Work-related tools or equipment	
<input type="checkbox"/>	Union dues	
<input type="checkbox"/>	Professional memberships	
<input type="checkbox"/>	Work-related travel (if deductible)	
<input type="checkbox"/>	Job search expenses (in certain cases)	
<input type="checkbox"/>	Classroom supplies (teachers)	
<input type="checkbox"/>	Continuing education courses	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

**Total Work & Education:**

## business & self-employment

<input type="checkbox"/>	Home office (business portion)	
<input type="checkbox"/>	Office supplies	
<input type="checkbox"/>	Business equipment	
<input type="checkbox"/>	Software and subscriptions	
<input type="checkbox"/>	Internet and phone (business portion)	
<input type="checkbox"/>	Advertising and marketing	
<input type="checkbox"/>	Website and hosting	
<input type="checkbox"/>	Business insurance	
<input type="checkbox"/>	Professional services (accountant, lawyer)	
<input type="checkbox"/>	Travel expenses	
<input type="checkbox"/>	Business meals	
<input type="checkbox"/>	Vehicle expenses (business use)	
<input type="checkbox"/>	Shipping and postage	
<input type="checkbox"/>	Inventory or materials	
<input type="checkbox"/>	Contractor or employee payments	
<input type="checkbox"/>	Bank and payment processing fees	

**Total Business & Self-Employment:**