

Types of Deductions

The types of deductions you can take depend a lot on your life situation. It's likely you won't need all of the documents listed below for your taxes.

Home and Vehicle Ownership

Forms 1098 or other mortgage interest statements
Real estate and personal property tax records
Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)
Electric vehicle information
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, and hospitals
Amounts paid for qualified insurance premiums if paid outside of the Marketplace or an employer provided plan
Health Insurance
Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

Childcare Expenses

Fees paid to a licensed day care center or family day care for care of an infant or preschooler
Amounts paid to a baby-sitter or provider care of your child under age 13 while you work
Expenses paid through a dependent care 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

K-12 Educator Expenses

Receipts for classroom expenses (for educators in grades K-12)

State and Local Taxes

Amount of state and local income or sales tax paid (other than wage withholding)
Invoice showing amount of vehicle sales tax paid and / or personal property tax on vehicles

Retirement & Other Savings

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