



# 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)