



Client Checklist for Deductions

- ☐ **Mortgage Interest - 1098** (form that's used to report the amount of interest and related expenses paid on a mortgage during the tax year by an individual or a sole proprietor when the amount totals \$600 or more)
- ☐ **Property Taxes** (home and /or vehicle)
- ☐ **Student Loan Interest - 1098-E** (If you paid interest on a qualified student loan, you may be able to deduct some or even all of that interest on your federal income tax return)
- ☐ **Health Savings Account - 1099-SA** (form to report distributions from health savings, medical savings, and Medicare Advantage accounts)
- ☐ **Medical Expenses** – (in 2023 you can deduct qualified unreimbursed medical care expenses that exceed 7.5% of your adjusted gross income, must be itemized)
- ☐ **Charitable Donation receipts**
- ☐ **Tuition - 1098-T** (form provides the details that can help you (or your parents/guardians) claim a tax credit for the tuition expense for higher education)
- ☐ **Child Care Expenses** (daycare, summer camp, etc)
- ☐ **Educator Expenses** – (for 2023, an eligible educator can deduct up to \$300 of qualifying expenses)