



## Client Checklist for Deductions

- **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)
- **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. Student loan companies use IRS Form 1098-E to report how much you paid in interest)
- **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)
- **1099-SA** (form to report distributions from health savings, medical savings, and Medicare Advantage accounts)
- **Tax notices received** (recent or for any year)
- **Charitable Donation receipts** (for 2020, you are able to deduct up to \$300 in charitable contributions even if you do not itemize)
- **Child Care Statements**