



Common Tax Documents for Deductions & Credits Checklist

You can use the checklist below to track the common documents you need in order to prepare your taxes. You may need additional documents for each list. It is possible that not every document will apply to you.

Documents or Records of...	These documents show:	Where it's reported
<input type="checkbox"/> Bank statement for your mortgage <input type="checkbox"/> Property tax bill	Mortgage interest & Property taxes	Schedule A Form
<input type="checkbox"/> Charity name & address <input type="checkbox"/> Proof of donation (credit card statement, receipt, check image)	Charitable deductions	Schedule A Form
<input type="checkbox"/> Annual vehicle registration statement	Automobile deductions	Schedule A Form
<input type="checkbox"/> Form 1098 T <input type="checkbox"/> Receipts from book purchases	Education: Tuition, Books & Student loan interest	Schedule A Form
Receipts from: <input type="checkbox"/> Payments to doctors or dentists for services <input type="checkbox"/> Hospital fees <input type="checkbox"/> Some insurance premiums (including Medicare)	<input type="checkbox"/> Prescription medications <input type="checkbox"/> Medical equipment and supplies <input type="checkbox"/> Personal protective equipment (PPE)	Medical Deductions
And <input type="checkbox"/> W-2 form <input type="checkbox"/> Log of miles driven for medical purposes		
<input type="checkbox"/> Receipts from purchases with sales tax	State & Local Taxes, OR State Income Taxes	Schedule A Form
<input type="checkbox"/> Receipts for items bought for work	Job-related Expenses	Schedule A Form
<input type="checkbox"/> Receipt from tax preparer	Tax Preparation Fees	Schedule A Form
<input type="checkbox"/> Annual vehicle registration statement <i>(includes make, model, VIN #, license plate #, amount paid, tax-deductible amount)</i>	Automobile deductions	Schedule A Form





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<input type="checkbox"/> Payments made to a daycare center, nanny, household employee, etc.	Child & Dependent Care Credit	Form 2441
<input type="checkbox"/> W-2 form (if you make under \$57,000 (proof of salary)) <input type="checkbox"/> Social Security Number of child(ren)	Earned Income Credit	Form EIC
<input type="checkbox"/> Annual contributions statement (sent by the institution paying the IRA)	Individual Retirement Deduction (IRA)	Form 5498
Receipts from: <input type="checkbox"/> Payments made to a shipping company <input type="checkbox"/> Supplies bought for the move <input type="checkbox"/> Gas for travel <input type="checkbox"/> Hotel expenses <input type="checkbox"/> Restaurant expenses	Moving Expenses	Form 3903
<input type="checkbox"/> Proof that property is in disaster area (via www.disasterassistance.gov)	Casualty & Theft Deduction	Form 3684
<input type="checkbox"/> Divorce papers stating the amounts of the alimony <input type="checkbox"/> Evidence of payments made	Alimony	Schedule 1

