

EXPENSE & DEDUCTION RECORDS

To maximize refund or lower liability.

SELF-EMPLOYED / SMALL BUSINESS

Category	Description / Notes	Amount (\$)	Receipt Attached? (Y/N)
Supplies & Materials	Receipts for supplies, advertising, materials, etc.		
Business Mileage	Odometer readings or mileage log		
Home Office	Square footage, rent, utilities, internet		
Equipment Purchases	Laptops, phones, software, furniture		
Meals / Travel / Marketing	Business meals, client events, travel, ads		
Bank / Credit Statements	Used for verification purposes		

PERSONAL DEDUCTIONS

Category	Description / Notes	Amount (\$)	Documentation Attached? (Y/N)
Charitable Donations	Cash or non-cash contributions		
Childcare Expenses	Provider name, EIN, total paid		
Education Expenses	Tuition receipts, Form 1098-T		
Student Loan Interest	Form 1098-E		
Mortgage / Property Taxes	Mortgage interest (Form 1098) or taxes		
Medical / Dental	Receipts if itemizing deductions		
Retirement Contributions	IRA, 401(k), or other accounts		
Health Savings Account	HSA contributions (Form 5498-SA)		

NOTES / ADDITIONAL INFORMATION
