



Itemized Deduction Document Checklist

TAX YEAR 2026

Use this checklist to help gather documents that may be relevant if you itemize deductions. Not every item will apply, and having these expenses does not necessarily mean itemizing will produce the best tax result.

1. MEDICAL & DENTAL EXPENSES

- ☐ Medical and dental expenses paid during the year
- ☐ Health insurance premiums paid with after-tax dollars, if potentially deductible
- ☐ Prescription medications and qualifying medical supplies
- ☐ Medical equipment and qualifying out-of-pocket medical expenses
- ☐ Mileage or transportation costs for qualifying medical care
- ☐ Long-term care premiums and expenses, if applicable

2. STATE & LOCAL TAXES

- ☐ Real estate taxes paid
- ☐ Personal property taxes, if applicable
- ☐ State and local income taxes paid or state/local sales-tax information, as applicable
- ☐ Records of estimated state or local income-tax payments made during the year

3. HOME MORTGAGE & INVESTMENT INTEREST

- ☐ Form 1098 - Mortgage Interest Statement
- ☐ Mortgage interest not reported on Form 1098, if applicable
- ☐ Points paid on the purchase or refinancing of a home
- ☐ Closing/settlement statements for a home purchased or refinanced during the year
- ☐ Investment interest expense records, if applicable

Keep your records organized.

Totals or summaries are helpful but retain receipts and supporting documentation with your tax records.

4. CHARITABLE CONTRIBUTIONS

- ☐ Cash/check/credit-card contribution receipts or year-end statements from qualified charitable organizations
- ☐ Written acknowledgments for qualifying charitable contributions when required
- ☐ Records of noncash charitable donations, including descriptions and fair-market-value information
- ☐ Receipts/appraisals or other documentation for larger noncash donations, when applicable
- ☐ Mileage and unreimbursed expenses related to qualifying charitable service

5. OTHER POTENTIAL ITEMIZED DEDUCTIONS

- ☐ Federally declared disaster casualty/theft loss records, if applicable
- ☐ Certain unreimbursed employee expenses if you fall within a qualifying category
- ☐ Gambling-loss records to the extent applicable to reported gambling winnings
- ☐ Other documents you believe may relate to an itemized deduction

Not sure whether an expense qualifies?

Bring the information with you. School Creek Taxes can determine whether it may be relevant to your return.

Keep personal information secure.

This public checklist is only a guide. Do not send Social Security numbers, bank information or sensitive tax documents through ordinary email or the website contact form.

This checklist is a general guide. Additional records or information may be requested based on your individual tax situation.