CHECKLIST · FINANCIAL MANAGEMENT

FREE PREVIEW

Tracking Tax-Deductible Expenses



Keeping track of deductible expenses ensures you maximize tax benefits and stay prepared for filing. Use this checklist to stay organized.

10 steps · Print-ready A4

NAME	START	TARGET DATE

1 Understand Deductible Categories

Research what expenses qualify, such as business costs, charitable donations, medical bills, or education-related expenses.

TIP *Refer to IRS publications or consult a tax professional to stay up to date on eligible deductions.*

2 Create a Filing System

Use labeled folders or digital tools to organize receipts and records by category.

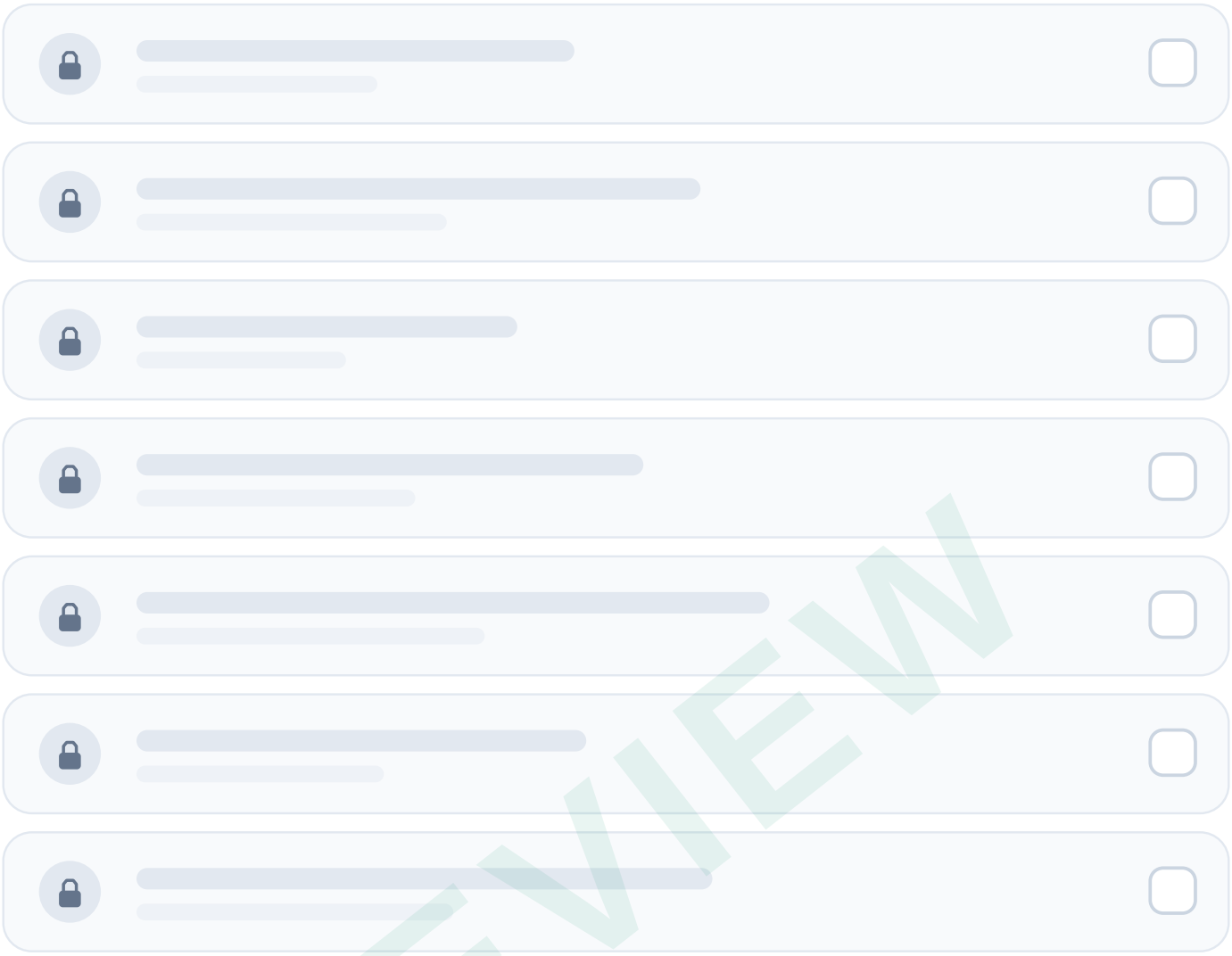
TIP *Create subcategories like "Home Office," "Travel," or "Medical" for faster reference during filing.*

3 Track Business Expenses

Record costs like supplies, software subscriptions, work-related travel, or equipment purchases.

TIP *Include mileage logs for work-related car use, as these may qualify for deductions.*

PREVIEW



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