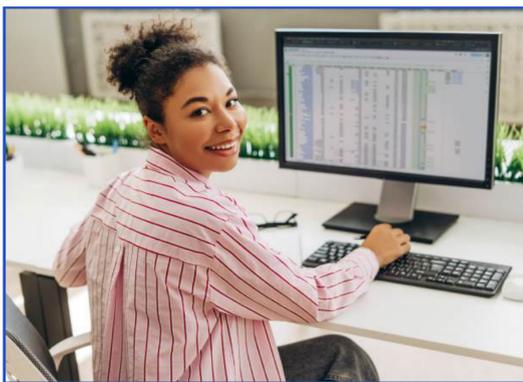


# Hidden Tax Deductions Clients Overlook

## 1. Work-Related Expenses for Freelancers and Side Hustlers

Clients with freelance income, gig work, or small business activities may not properly document income and expenses. Review mileage, home office usage, and phone expenses. Calculate the business portion of these expenses and document the supporting evidence. (This helps you show exactly how you arrived at the deduction if questions come up later.)



## 2. Education-Related Deductions Your Clients Might Miss

Improve your client's return by evaluating education-related tax benefits. Review records for qualifying tuition payments, course fees, and learning materials that support their current profession. A thorough review ensures your clients receive every education benefit they're entitled to—valuable savings they might otherwise miss.



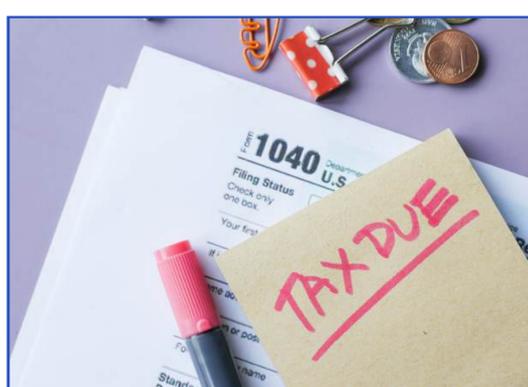
## 3. Medical and Health-Related Expenses That Often Go Unreported

Evaluate medical expenses when clients face high out-of-pocket costs. Clients rarely track these expenses in an organized way. Sort through year-end summaries, insurance statements, and pharmacy receipts to identify deductions that qualify under IRS rules. Also consider expenses related to dental care, vision care, and specialized treatments.



## 4. State and Local Tax Deductions Hidden in Everyday Transactions

People often forget they can deduct some state and local taxes. These include property tax bills, the annual fee for car registration, and state income taxes paid throughout the year (such as quarterly payments). Your careful review helps clients connect their tax liabilities and deductibles to where and how they live. Explaining how these deductions work helps them plan better for future years and positions you as a trusted resource for tax planning.



## 5. Charitable Contributions Clients Forget to Document

Charitable contributions are often incomplete when clients first arrive with their documents. Carefully review their donations to ensure they capture all eligible contributions. This includes cash donations made throughout the year and non-cash donations such as clothing, furniture, and household goods. Verify receipts, bank statements, and digital donation confirmations.



## 6. Building a System to Catch Overlooked Deductions

Develop a system for preventing missed deductions and maintaining accuracy under pressure. From interview questions to document checklists and review templates, a consistent method helps guide meaningful conversations and document reviews. Your ability to ask good questions and spot overlooked deductions demonstrates your professionalism and attention to detail.

