

Tax Matters

2052 Newport Boulevard, Suite 6, Costa Mesa, California 92627-7158



MEDICAL EXPENSES

Client:

ID#:

Tax Year:

The purpose of this worksheet is to help you organize your tax deductible business expenses and **maximize your deductions**.
 These expenses must be paid by the taxpayer and for the taxpayer's self, spouse, or dependent.
 Do not deduct expenses that are reimbursed by insurance or other sources.

MEDICATIONS AND DRUGS		OTHER MEDICAL AND DENTAL EXPENSES	
	Prescription Drugs		Ambulance
	Insulin		Anesthesia
	Other		Asthmatic Air Conditioner
	TOTAL		Braces
DOCTORS, DENTISTS, PSYCHIATRISTS, PSYCHOLOGISTS, CHIROPRACTORS, ACUPUNCTURE, CNAs, PHYSICAL THERAPISTS			Canes
	Dr.		Capital Improvements (Amount not adding to FMV)
	Dr.		Contact Lenses
	Dr.		Crutches
	Dr.		Elastic Hose
	Dr.		Elevator for Heart Patient
	Dr.		Eyeglasses
	Dr.		Hearing Aid Batteries
	Dr.		Hearing Aids
	Dr.		Heating Pads
	Dr.		Hospital Equipment
	Dr.		Hospital Supplies
	Dr.		Humidifiers
	Dr.		Laboratories
	CNAs		Long Distance Telephone to Schedule Appointments
	Physical Therapists		Massage Units
	TOTAL		Mental Therapy
HOSPITALS, CLINICS, SANITARIUMS			Nurses
			Optometrists
			Orthopedic Shoes
			Oxygen
			Prescribed Exercise Equipment
			Prescribed Pools and Spas
			Psychiatric Care
			Repairs on Capital Improvements
			Surgical Equipment
			Travel & Transportation - Parking & Tolls
			Travel & Transportation & Lodging
			Vibrators
			Water Fluoridation Systems
			Wheel Chair
			Wheel Chair Ramps
			Wigs
			X Rays
			Prescribed Health Institutes, Gymnasium, Swim Clubs
			Special Schools for the Handicapped
	TOTAL		TOTAL
INSURANCE			
	Health Insurance		
	Hospital Insurance		
	Group Insurance		
	Contact Insurance		
	School Insurance		
	Supplemental Medicare		
	Other Insurance		
	Other (Do not include income protection plans)		
	TOTAL		