



Cannon Tax & Accounting, Inc.

Medical Expense

Worksheet

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Client # T S

Client has back-up docs	
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This worksheet is to assist you in organizing receipts for Medical Expenses incurred throughout the year.

- **PLEASE NOTE:** if you provide loose receipts, invoices, bills, etc. without total \$ amounts, you will incur an additional charge for labor on your tax preparation invoice.
- Medical Expenses can be a deduction if specific conditions are met. If you are unsure if you meet these conditions, you may provide us with totals below, and we will make the determination for you.
- **Retired Public Safety Officers:** let us know if you participate in a state/local government health insurance plan, and provide total amount paid for health insurance for the year.

What is a Medical Expense?

Examples of medical expenses include:

- Preventative care
- Treatments
- Surgeries
- Dental Care
- Acupuncture
- Fertility treatment
- X-rays
- Service animals
- Psychologists
- Psychiatrists
- Prescription medications
- Vision care
- Specialists
- Mileage & Parking fees
- Home alterations
- Long-term care
- Nursing care
- Lab fees
- Smoking cessation
- Adoption Expenses
- Medical devices such as glasses, contacts, false teeth and hearing aids, blood sugar test kits, wheelchairs, etc.

What proof do I need?

You should keep any statements or itemized invoices showing costs incurred and unreimbursed by insurance and not paid for by HSA or FSA spending accounts. Also keep documentation of who received the care, and the general purpose of the care received.

What does Cannon need?

For us, we simply need totals in the categories below. We do not need the documentation mentioned above but advise you to keep all records related to the medical expenses you are claiming.

Adoption Expenses: \$ _____ Insurance Premiums: \$ _____

Prescription Drugs: \$ _____ All other Expenses: \$ _____

Parking Fees: \$ _____ Medical Mileage: _____
miles