

# Advisor Tax Services

**Medical / Dental / Eyecare Expense Organizer:**

**Tax Year \_\_\_\_\_**

**Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_**

**List amounts for all expenses that you paid for yourself, spouse or dependents:**  
**(retain proof of expenses or receipts in your tax records for at least 7 years)**

**Note: (only expenses greater than 10% (7.5% if taxpayer or spouse is 65 or older) of your Adjusted Gross Income are deductible)**

- \$ \_\_\_\_\_ Health insurance premiums paid (not pre-tax by payroll deduction)
- \$ \_\_\_\_\_ Medicare Part A and/or B premiums (from 1099-SSA)
- \$ \_\_\_\_\_ Medicare Advantage/Medigap/Medicare supplement insurance premiums
- \$ \_\_\_\_\_ Medicare Part D or other prescription drug insurance premiums
- \$ \_\_\_\_\_ Dental or vision care insurance premiums
- \$ \_\_\_\_\_ Long term care insurance premiums
- \$ \_\_\_\_\_ Doctor bills & co-pays including Psychiatric/Mental Health care
- \$ \_\_\_\_\_ Lab fees, X-ray, MRI, Cat scans, etc.
- \$ \_\_\_\_\_ Hospital/Ambulance
- \$ \_\_\_\_\_ Physical Therapy/Chiropractor
- \$ \_\_\_\_\_ Prescription drugs
- \$ \_\_\_\_\_ Insulin/syringes/diabetic test kits
- \$ \_\_\_\_\_ Medical devices (such as wheelchair, leg brace, oxygen tank, crutches, etc.)
- \$ \_\_\_\_\_ Hearing aids & batteries
- \$ \_\_\_\_\_ Nursing home (requires letter from provider detailing expenses)
- \$ \_\_\_\_\_ Dental/Orthodontic/Dentures
- \$ \_\_\_\_\_ Vision care
- \$ \_\_\_\_\_ Eyeglasses/contact lenses/lens cleaning supplies
- \$ \_\_\_\_\_ Lasik or other eye surgery
- \$ \_\_\_\_\_ In home care/nursing services
- \$ \_\_\_\_\_ Overnight lodging & travel to appointments
- \$ \_\_\_\_\_ other (describe) \_\_\_\_\_
- \$ \_\_\_\_\_ other (describe) \_\_\_\_\_
- \$ \_\_\_\_\_ other (describe) \_\_\_\_\_
- \$ \_\_\_\_\_ other (describe) \_\_\_\_\_

\_\_\_\_\_ Mileage to drive to & from appointments or to acquire supplies/prescriptions

**There are many more eligible medical expenses too numerous to list here.  
See IRS publication 502 for more comprehensive list.**

**<http://www.irs.gov/pub/irs-pdf/p502.pdf>**