

SCH A WORKSHEET

CLIENT NAME:

TAX YEAR:

MEDICAL EXPENSE

DOCTOR VISIT (COPAY)

PRESCRIPTIONS DRUGS

LONG-TERM CARE INS.

THMTRS & BANDAGES

OPERATIONS

LAB & X-RAY

ORTHOPEDIC SHOES

THERAPY SESSION COST

PHYSICAL THERAPY

CANES/CRUTCHES/BRACES

WHEELCHAIRS

VAPORIZERS

MEDICAL MILES DRIVEN

OTHER:

OTHER:

VISION EXPENSE

GLASSES

CONTACT LENSES

VISION (COPAY)

OTHER:

DENTAL EXPENSE

DENTAL INSURANCE (COPAY)

ORAL SURGERY

DENTURES/ BRACES

DENTAL IMPLANTS

TOOTH EXTRACTIONS

OTHER:

OTHER:

OTHER:

SCH A EXPENSE WORKSHEET

TAXES YOU PAID

REAL ESTATE TAX

DMV FEES

PREPAID PROPERTY TAX
(PURCHASE OF HOME)

CONTRIBUTIONS

GIFTS BY CASH

GIFTS BY CHECK

OTHER THAN CHECK/CASH

CHARITY

UNREIMBURSED EMPLOYEE EXPENSE (W2 EMPLOYEE ONLY)

CLOTHING & UNIFORMS

WORK-RELATED EDUCATION

TRAVEL

UNION DUES

LICENSES

OTHER:

OTHER:

NAME:

NAME:

NAME:

NAME:

NAME:

NAME:

NAME:

NAME:

NAME:

NAME:

NAME:

OTHER EXPENSES

JOB SEARCH EXPENSES

LAST YEAR'S TAX PREPARATION
FEE

SCH A EXPENSE WORKSHEET

CAN YOU PROVIDE DOCUMENTATION BELOW TO SUBSTANTIATE YOUR EXPENSES?

- ☐ MEDICAL BILLS
- ☐ MEDICAL RECEIPTS
- ☐ DENTAL BILLS
- ☐ MILEAGE RECEIPTS
- ☐ CHARITY RECEIPTS

- ☐ MORTGAGE STATEMENT
- ☐ PROPERTY TAX STATEMENT
- ☐ INSURANCE STATEMENT
- ☐ INVESTMENT STATEMENT
- ☐ MISCELLANEOUS DEDUCTION RECEIPTS

By signing this form, I confirm that I have provided **MJS & Associate** with accurate information, supported by the necessary documents. I have ensured that I retain all the documents and other data that form the basis of my expenses on this return. This includes receipts, invoices, bank statements, and other relevant documents.

"I declare under penalty of perjury that the information provided, whether written or verbal, is true and accurate. This means that I am legally bound to ensure that the provided information is truthful and correct. Falsifying or misrepresenting information could result in civil or criminal penalties."

THIS DOCUMENT EXECUTED ON _____

PRINT NAME: _____

SIGNATURE: _____

DATE: _____

As per the IRS, it is mandatory to report all income you receive, regardless of the source. You must also keep and maintain records to support all the items mentioned on your return. For claiming deductions related to charitable contributions, travel, auto mileage, computer use, etc., specific written records are necessary. At MJS & Associates, we are your advisors and preparers, but you are ultimately responsible for your return accuracy and overall correctness.