

# SCH A WORKSHEET



CLIENT NAME:

TAX YEAR:

MEDICAL EXPENSE		VISION EXPENSE	
DOCTOR VISIT (COPAY)		GLASSES	
PRESCRIPTIONS DRUGS		CONTACT LENSES	
LONG-TERM CARE INS.		VISION (COPAY)	
THMTRS & BANDAGES		OTHER:	
OPERATIONS		DENTAL EXPENSE	
LAB & X-RAY		DENTAL INSURANCE (COPAY)	
ORTHOPEDIC SHOES		ORAL SURGERY	
THERAPY SESSION COST		DENTURES/ BRACES	
PHYSICAL THERAPY		DENTAL IMPLANTS	
CANES/CRUTCHES/BRACES		TOOTH EXTRACTIONS	
WHEELCHAIRS		OTHER:	
VAPORIZERS		OTHER:	
MEDICAL MILES DRIVEN		OTHER:	
OTHER:			
OTHER:			

# SCH A EXPENSE WORKSHEET

TAXES YOU PAID		CONTRIBUTIONS	
REAL ESTATE TAX		GIFTS BY CASH	
DMV FEES		GIFTS BY CHECK	
PREPAID PROPERTY TAX (PURCHASE OF HOME)		OTHER THAN CHECK/CASH	
		CHARITY	
UNREIMBURSED EMPLOYEE EXPENSE (W2 EMPLOYEE ONLY)		NAME:	
CLOTHING & UNIFORMS		NAME:	
WORK-RELATED EDUCATION		NAME:	
TRAVEL		NAME:	
UNION DUES		NAME:	
LICENSES		NAME:	
OTHER:		NAME:	
OTHER:		NAME:	
OTHER EXPENSES			
JOB SEARCH EXPENSES		NAME:	
LAST YEAR'S TAX PREPARATION FEE		NAME:	

# 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.*