

Deductible Expenses for Taxes Medical, Retirement, Other

Deductible Medical Costs

Date	Provider	Amount	Date	Provider	Amount
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

(HSA) Health Savings Accounts *Note: 401(k) and 403(b) are shown on W-2 and are deducted from gross pay.*

Retirement Plan Contributions (Classic IRA, Roth IRA, SEP IRA, Keogh)

Account type and number _____	Date _____	Amount _____
Account type and number _____	Date _____	Amount _____
Account type and number _____	Date _____	Amount _____
Account type and number _____	Date _____	Amount _____
Account type and number _____	Date _____	Amount _____
Account type and number _____	Date _____	Amount _____

Deductibility varies according to type of account and your personal situation. Consult your tax guide or a tax advisor.

Note: Certain legal fees for unlawful discrimination and certain other lawsuits may be deducted on page one of Form 1040.

Other Deductible Expenses (generally deductible only if total is more than 2% of total income)

- Tax preparation fees _____ Explanation _____
- IRA fees _____ Explanation _____
- Financial planning and management expenses _____ Explanation _____
- Safe-deposit box _____ Explanation _____
- Other _____