



STERNAT + ASSOCIATES
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MEDICAL EXPENSES SUMMARY
Prepared by Client

Summary	Client Name	Client Name	Dependent Name	Dependent Name
Prescriptions	\$	\$	\$	\$
Dental				
Eye Care (glasses/exams)				
Chiropractic				
Other (Specify)				
Other (Specify)				
Other (Specify)				
Other (Specify)				
Other (Specify)				
TOTAL				

Medical Plan Premiums				
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ELIGIBILITY

Medical expenses that are paid for yourself, your spouse or common-law partner, your or your spouse's or common-law partner's children. The total of all expenses must add up to the lesser of 3% of your net income and \$1,728, or nothing can be claimed.

The above list includes the most common medical expenses. CRA provides in-depth guidance on more specific items in their publications: RC4064 - Medical and Disability - Folio S1-F1-C1.

Common expenses that are **NOT** eligible:

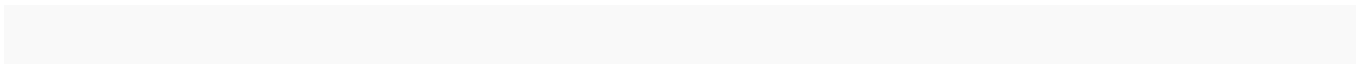
- Massage therapy - Athletic or fitness club fees - Cosmetic surgery - Cost of organic food
- Cost of over-the-counter medications and supplements - Cost of blood pressure monitors

PAID BY YOU

Expenses must have been paid by you.

Do not include any amounts that were reimbursed or covered by an employer or medical plan, unless they were included in your taxable income.

We have claimed medical expenses based on the amounts provided by you. We have not reviewed any of the bills to ensure they qualify, nor have we done any work to ensure the list is accurate or complete. **Please retain all your receipts.**



TRAVEL EXPENSES

To claim transportation and travel expenses, the following conditions must be met:

- substantially equivalent medical services were not available near your home
- you took a reasonably direct travelling route
- it is reasonable, under the circumstances, for you to travel to that place for those medical services

Travel less than 40km – no claim for travel permitted

Travel 40km but less than 80km (one way)

If you had to travel at least 40 kilometres one way from your home to obtain medical services, you may be able to claim the public transportation expenses, or vehicle expense if public transportation is unavailable.

Travel 80km or more (one way)

If you had to travel at least 80 kilometres one way from your home to obtain medical services, you may be able to claim accommodation, meal, and parking expenses in addition to your transportation expenses as medical expenses.

Detailed method: actual expenses paid (\$)

OR

Simplified method: based on km's driven

each trip should include kms to drive to the facility and back home.

	Date	KM driven round trip		Date	KM driven round trip		Date	KM driven round trip
Trip 1			Trip 11			Trip 21		
Trip 2			Trip 12			Trip 22		
Trip 3			Trip 13			Trip 23		
Trip 4			Trip 14			Trip 24		
Trip 5			Trip 15			Trip 25		
Trip 6			Trip 16			Trip 26		
Trip 7			Trip 17			Trip 27		
Trip 8			Trip 18			Trip 28		
Trip 9			Trip 19			Trip 29		
Trip 10			Trip 20			Trip 30		

If a medical practitioner certifies in writing that you were not able to travel alone to get medical services, you can also claim the transportation and travel expenses of an attendant.

How many trips (where you travelled over 160 km round trip) required an attendant? _____