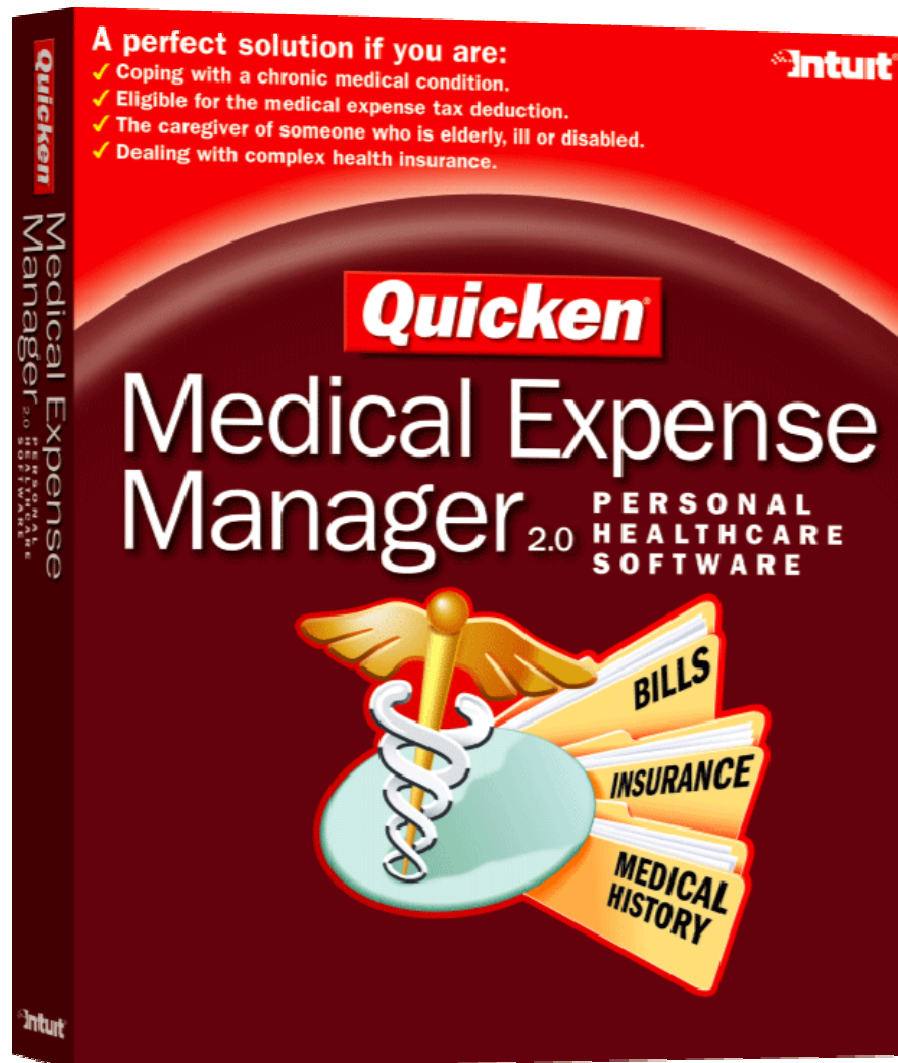


**Quicken**

# Medical Expense Manager



## Reviewer's Guide

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**Key Product Benefit:**

The U.S. healthcare system is complex, confusing and hard to navigate. More and more, people are being forced to take a more active role in managing their own healthcare finances, yet they are not given the tools or resources to do so effectively. Quicken® Medical Expense Manager 2.0 helps people navigate the financial aspect of the healthcare system - giving them clarity, control and peace of mind.

It is now easy to organize even the heaviest loads of medical paperwork, create a complete family medical history, track expenses, find tax deductions, identify overpayments and manage disputes – all in one place.

**People who can benefit the most from Quicken Medical Expense Manager:**

People suffering – or caring for someone suffering - from a chronic medical condition or injury that requires multiple or recurring doctor visits; the “Sandwich Generation” giving care to both children and elderly parents; baby boomers; senior citizens; pregnant women and parents raising children; people with complex insurance situations – including Medicare, supplemental and multiple insurance carriers (up to five); people using or thinking about using a Flexible Spending Account.

**Price and Availability:**

- \$69.99 with an introductory \$20 discount. Pay just **\$49.99**
- Version 2.0 is available for purchase beginning February 6, 2006.
- Product information, e-store, and user forum available at: [www.quickenmedical.com](http://www.quickenmedical.com)

**System Requirements**

- **Computer:** IBM or Compatible Pentium 200 (PII 300 recommended)
- **Operating System:** Windows 98 SE, 2000, Me, XP
- **Browser:** Internet Explorer 6.0 or higher
- **Memory:** 128 MB RAM (256 MB RAM recommended)
- **Hard Disk Space:** 200MB
- **Monitor:** SVGA 800x600 supported. (1024 x 768 with 16-bit color recommended). Large fonts supported
- **CD-ROM Drive:** CD-ROM or DVD drive required for installation of the CD-ROM version (not required if product is downloaded)
- **Internet Connection:** 56 Kbps or higher recommended for Internet functionality
- **Printer:** Any printer supported by Windows 98/2000/Me/XP

*Quicken Medical Expense Manager is a standalone product designed specifically to track medical expenses and does not integrate with Quicken personal finance software or TurboTax®.*

**Pressroom:**

The Intuit pressroom ([www.intuit.com/pressroom](http://www.intuit.com/pressroom)) is a resource for reporters and editors that contain press releases, fact sheets, reviewer's guides, customer testimonials and videos, and print- or web-ready screen shots and box shots. To obtain Quicken Medical Expense Manager product information, select “Quicken Medical Expense Manager” from the Virtual Press Kits menu and click “Go.”

## Product Features

### Keep Critical Medical Information All In One Place

Quicken Medical Expense Manager makes it easy to track and organize healthcare expenses for your entire family. It helps you understand what to do when a medical bill arrives, have peace of mind that you are paying only what you owe, and helps you make the most of your healthcare dollars by providing insight into the financial aspects of complex medical issues.

Quicken Medical Expense Manager offers many advantages over homegrown tracking methods like pen and paper or spreadsheets and eliminates piles of paperwork.

**Expense Log** - Easily manage bills and payments in this central location and establish an individual and family medical history that includes medical visits, prescriptions and insurance statements.

Manage your entire family's healthcare (even your pets!) in one place.

Easily store and access all of your medical, dental, and insurance contact information.

Version 2.0 was built with the help of feedback from version 1.0 customers.

Expense Log for All

Service Date	Person	Provider	Service(s)	Amt. Billed	Ins. Paid	My Resp.	My Pmts.	Balance	Status
6/18/2005	Susie	Bayne, Ho...	Doctor visit	65.00	30.00	20.00	20.00	0.00	Paid
6/28/2005	Susie	OvernetDrug	Rx:Glucopha...	0.00	0.00	129.88	129.88	0.00	Paid
7/11/2005	Susie	Diagnostic...	Laboratory	412.00	297.00	0.00	0.00	0.00	Pending:
7/14/2005	Susie	OvernetDrug	Rx:pioglitazo...	0.00	0.00	222.41	222.41	0.00	Paid
7/15/2005	Susie	Kulver's Dr...	Rx:Test strips	0.00	0.00	43.99	43.99	0.00	Paid
8/18/2005	Susie	Bayne, Ho...	Doctor visit	65.00	30.00	20.00	20.00	0.00	Paid
8/27/2005	Andy	Bayne, Ho...	Injection	221.00	156.80	20.00	20.00	0.00	Paid
8/28/2005	Andy	Tingey, Eri...	Braces	4,000.00	1,200.00	1,200.00	1,200.00	0.00	Paid
9/4/2005	Susie	Kulver's Dr...	Rx:Test strips	0.00	0.00	43.99	43.99	0.00	Paid
9/13/2005	Andy	Bayne, Ho...	Doctor visit	135.00	75.00	20.00	20.00	0.00	Paid
9/21/2005	Andy	Wright Aid	Rx:Bobotusfrin	0.00	0.00	7.99	7.99	0.00	Paid
11/9/2005	Susie	Diagnostic...	Blood chemi...	0.00	0.00	0.00	20.00	(20.00)	Paid
11/18/2005	Susie	University ...	- Multiple -	367.00	347.00	20.00	15.00	5.00	
			Doctor visit	246.00	220.00	26.00			
			Blood chemi...	121.00	127.00	(6.00)			
11/30/2005	Andy	Bayne, Howa	Doctor visit	135.00	95.00	0.00	20.00	(20.00)	Paid
12/20/2005	Susie	University ...	Doctor visit	682.37	483.48	0.00	0.00	0.00	
1/3/2006	Andy	A Plus Opti...	Eyeglasses	88.00	0.00	80.50	22.00	58.50	Pending:
1/17/2006	Person	Provider	Service(s)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Status
<b>Total</b>				<b>\$15,795.90</b>	<b>\$8,609.37</b>	<b>\$5,404.35</b>	<b>\$5,454.85</b>	<b>(\$50.50)</b>	

Quickly find and sort important information by family member, provider, medical reason, or date - a huge time saver compared to file folders or spreadsheets when you need to find a specific record.

The Balance/Status column shows you exactly what and whom you owe and the status of all your medical bills.

Simply click "Enter Expense" in the upper left corner to capture important data from your Explanation of Benefits and bills into the Expense Details screen.

## Pay Only What You Owe

Quicken Medical Expense Manager's Expense Details screen is built to be as flexible as you need it to be - Track just the high level data (service date, your responsibility and payments) or delve into the details (insurers, deductibles, tax deductions).

- Get clarity and control over confusing medical bills and insurance documents - Each time you enter a document, you'll know immediately what to do next: send a payment, wait for insurance, or start asking questions.
- Keep track of the important information for a particular medical visit. With all the key data presented in a logical display, you can file the paperwork and forget it.
- Billing mistakes happen, you shouldn't have to pay for them. Quickly identify when a billing or insurance error has occurred and resolve disputes more effectively and efficiently by having all the important information at your fingertips.
- Track multiple services per expense. A common problem when each service is listed on a separate Explanation of Benefits and covered differently by insurance.
- Spot overcharges easily and make sure you don't pay the same bill twice.

Easily track mileage so you get the tax deduction you're entitled to.

Track multiple services per expense in one place.

Keep track of insurance payments and write-offs, so you only pay what you owe.

See exactly what you owe or what is owed to you by the provider.

*"I just enter each document as I receive it and I have a total record which I can look at in multiple ways. No more paging through my paper files to check on items and the financial record keeping is better than the Excel files I have used in the past."*  
 —Ted Fraley, Tampa, FL

## Effectively Dispute a Claim

Quicken Medical Expense Manager helps you identify if a billing or payment error has been made, guides you through the process of disputing a claim, and keeps track of all important information along the way.

- Billing Notes help you track the status of bills and payments. Medical Notes help you remember important conversations and directives from your doctor. No more searching for information on the back of envelopes or loose papers.
- Prewritten Dispute Letter templates help you resolve billing problems. Click the "Dispute Letter" button and select the reason for the dispute from the list of most common causes of errors. Your word processor opens with a letter prefilled with information about your specific medical visit and prompts you to include additional information that will help resolve the issue.
- Set a reminder to follow up with a provider or insurance company on a certain date so you can stay on top of pending disputes.

Quicken Medical Expense Manager - DemoFamily.mem

File Edit View Reports Lists Help

Enter Expense + Add Reminder +

Providers Insurers Calculator Feedback

Expense Log Reminders

Show info for: Expense Log for All

Expense Details Update Reset

Date of service: 11/30/2005 Person: Bayne, Howard

Service Provider: Bayne, Howard Reason: 12/28/2005: I took Andy to Dr Bayne on November 30th and paid \$20 copay, but insurance covered everything. I called them and told them they owe me \$20.

Roundtrip Mileage: 9 Park & Tolls: \$2.00 Tax & FSA S: 1/6/2006: Haven't received payment from them yet. Used the template to send them a dispute letter.

Services/Purchases Billing Notes Medical Notes

Service	Amount Billed	Provider Write-Off	= Amount Allowed
Doctor visit	135.00	40.00	95.00

Add Row

My Total Responsibility

- My Payments & Copays	\$20.00
= Balance	Provider Owes Me \$20.00

Reminder... Dispute Letter... Done Cancel

Expense Status: Pending: Provider

Date	Person	Provider	Service(s)	Amount Billed	Amount Paid	Amount Allowed	Amount Owed	Status
11/17/2006	Susie	Doctor visit	412.00	297.00	0.00	0.00	0.00	
1/18/2006	Person	Provider	Service(s)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total				\$16,523.27	\$9,226.74	\$5,399.35	\$5,454.85	(\$55.50)

*"Due to monumental family problems, our medical bills were in arrear for almost a year. It was not due to a lack of money, or insurance, we just got to the point where we couldn't make heads or tails of the mess. After using Quicken Medical Expense Manager and entering my medical expenses for 2004 and 2005, I was able to recover \$385.00 from medical overpayments on my part and point out \$285.00 in overpayments by my insurance company. While medical providers are not necessarily dishonest, their billing methods are not without flaws. In just one month, Medical Expense Manager has paid for itself 10 times." —Cruz Rodriguez, Mechanicsville, MD*



## Be Reminded of Upcoming Events.

The Reminder feature alerts you about upcoming scheduled appointments, prescriptions that need to be refilled, expenses that are pending, or disputes that require follow up.

The image shows two overlapping windows from the Quicken Medical Expense Manager. The 'Expense Details' window in the background contains the following information:

Expense Details	
Date of service	11/30/2005
Person	Andy
Service Provider	Bayne, Howard
Reason	Asthma
Roundtrip Mileage	9
Park & Tolls	\$2.00
Tax & FSA Status	Tax - Deductible

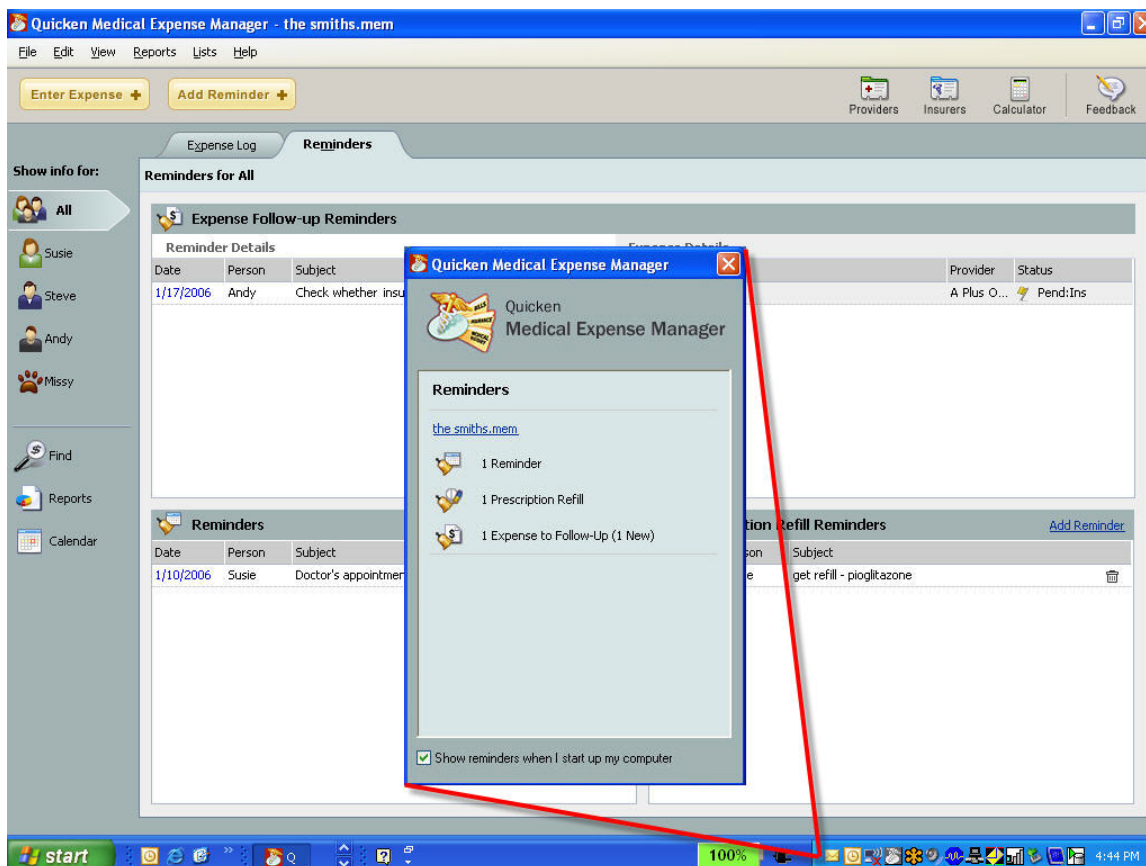
The 'Reminder Details' window in the foreground contains:

Reminder Details	
Subject	Call Dr Bayne, has he mailed payment yet?
Reminder for	Andy
Remind me on	1/24/2006

At the bottom of the 'Expense Details' window, there is a 'Reminder...' button circled in red. Other buttons include 'Dispute Letter...', 'Done', and 'Cancel'. The 'Expense Status' is set to 'Paid'.

*"(Quicken Medical Expense Manager) makes me feel more in control and more organized. I feel confident that I know all medications and appointments that have been made for my family."  
—Deanna Yates, Vail, AZ*

The next time you start your computer, a pop-up prompt lets you know what needs your attention.



## Track Claims and Payments Across Multiple Insurers

Increasingly, people have two or more insurers for any given medical service (incl. partial insurance from Medicare or veterans' benefits). Quicken Medical Expense Manager enables users to track up to five plans for each medical service, and works for any type of insurance from any insurance company, including Medicare.

The screenshot shows the 'Expense Log for Susie' window with a table of medical services. A red box highlights the 'Insurance Payments' dialog box, which is open for the service '7/11/2005 Diagnostic Labs Laboratory'. The dialog box contains a table for tracking payments from multiple insurers.

Primary	Insurer	Amt. Paid	Paid To	Paid On	Provider In-Network?	Deduct	Ref	Del
	Medicare	153.00	Provider	7/18/2005	<input checked="" type="checkbox"/>			
2	SupplMental	77.00	Provider	8/12/2005	<input checked="" type="checkbox"/>			
3	Tricare	67.00	Provider	9/28/2005	<input checked="" type="checkbox"/>			
4								
5								
Total		\$297.00						

## Tracking Multiple Payments per Expense

Quicken Medical Expense Manager makes it easy to track multiple payments made for a single expense.

The screenshot shows the 'Expense Log for All' window with a table of medical services. A red box highlights the 'My Payments & Copays' dialog box, which is open for the service '8/28/2005 Andy Tingey, Erick Braces'. The dialog box contains a table for tracking payments and copays for this expense.

Date	Amount	Copay	Payment Method	Reference	Del
8/28/2005	400.00	<input type="checkbox"/>	Check	3 mos of installments	
9/28/2005	400.00	<input type="checkbox"/>	Check	3 mos of installments	
10/28/2005	400.00	<input type="checkbox"/>	Check	3 mos of installments	
Total		\$1,200.00			

## Get Insight into the Financial Issues Associated with Complex Medical Issues.

With the Quicken Medical Expense Manager reports, the information you need is right at your fingertips to make the most of your healthcare dollars. Calculate expenses, track deductibles and out-of-pocket maximums, capture tax deductions, generate a family medical history, and make the most of your flexible spending account.

## Make Informed Decisions About Your Healthcare Spending

The **Cost Calculator** lets you see exactly where your healthcare money is going and how to spend it best.

- Get a clear and current picture of medical spending. The more organized your information is, the easier it is to make smart budgeting decisions.
- Get a detailed view of your medical costs and answer important questions like:
  - "How much did we spend on Mom's prescription drugs this year?"
  - "How much did I spend on allergy medicine last year?"
  - "Is dentist A more expensive than dentist B?"
  - "Is it cheaper to buy my medications through an online retailer or my local pharmacy?"

**Cost Calculator**    Deductibles/OOP Max    Tax Deductions    Patient History    FSA

Calculate costs for: ☒ Expenses    ☐ Services

**Expenses**    This report totals group of Expenses. Select expenses to total:

Person: ☐ Missy ☐ Steve ☒ Susie    Provider: ☒ Not categorized ☒ A Plus Optical ☒ Aldoukhov, Ser

Reason: ☐ Cough ☐ Crown ☒ Diabetes    Status: Any    Date From: 1/ 1/2005    To: 1/ 1/2006

**Your payments total \$741.67 for the selected expenses:**

Service Date	Person	Provider	Reason	Service(s)	Insurer(s)	Amt. Billed	My Resp.	My Pmts.	Balance	Status
4/23/2005	Susie	OvernetDr...	Diabetes	Rx:pioglitazo...	Health Ca...	222.41	222.41	222.41	0.00	Paid
5/6/2005	Susie	Kulver's D...	Diabetes	Rx:Test strips	No Insura...	43.99	43.99	43.99	0.00	Paid
6/28/2005	Susie	OvernetDr...	Diabetes	Rx:Glucopha...	Health Ca...	129.88	129.88	129.88	0.00	Paid
7/15/2005	Susie	Kulver's D...	Diabetes	Rx:Test strips	No Insura...	43.99	43.99	43.99	0.00	Paid
9/4/2005	Susie	Kulver's D...	Diabetes	Rx:Test strips	No Insura...	43.99	43.99	43.99	0.00	Paid
11/9/2005	Susie	Diagnostic...	Diabetes	Blood chemi...		0.00	0.00	20.00	(20.00)	Paid
11/14/2005	Susie	OvernetDr...	Diabetes	Rx:pioglitazo...	Health Ca...	222.41	222.41	222.41	0.00	Paid
11/18/2005	Susie	University...	Diabetes	- Multiple -	- Multiple -	367.00	20.00	15.00	5.00	
				Doctor visit	Health Ca...	246.00	26.00			
				Blood chemi...	Health Ca...	121.00	(6.00)			
12/20/2005	Susie	University...	Diabetes	Doctor visit	Health Ca...	682.37	0.00	0.00	0.00	
<b>Total</b>						<b>\$1,756.04</b>	<b>\$726.67</b>	<b>\$741.67</b>	<b>(\$15.00)</b>	

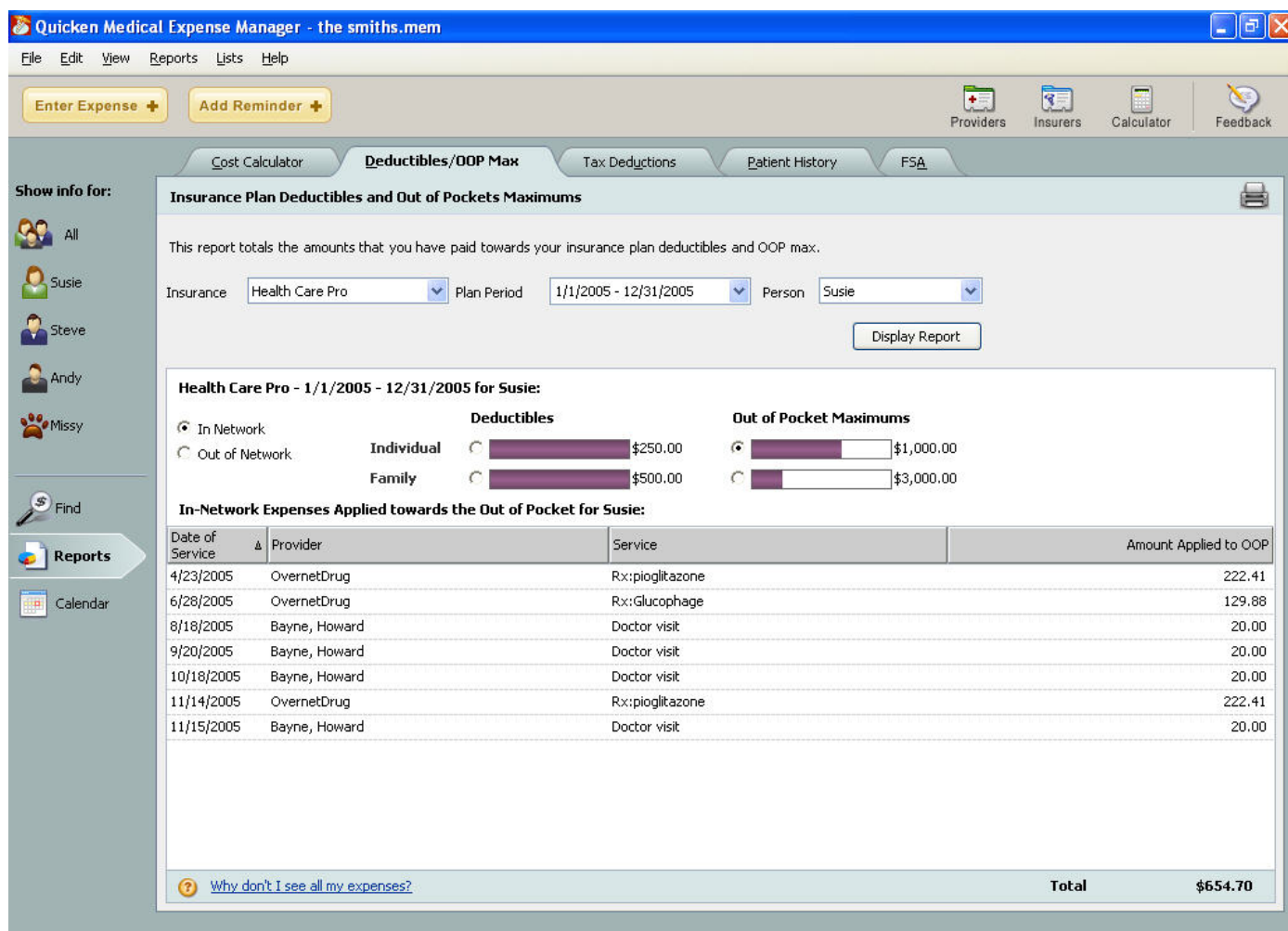
"I am truly excited that I've found a tool that can truly manage the complexities associated with the medical and pharmaceutical insurance industry. Thank you Intuit!" - James Sampel, Greenwich, CT



## Know Instantly When You've Met Your Insurance Plan Deductibles

Be sure whether or not insurance will cover a claim by getting insight into your family's progress against deductibles and Out-Of-Pocket maximums.

- The **Deductions/OOP Max Report's** bar charts show progress by insurer and time period against deductibles/OOP Maximums, for both in- and out-of-network providers, for individuals or families, and a table of included payments.



*"I really think that this is a great program. It makes keeping track of all medical information very simple and efficient. It is a great benefit for those that have many medical expenses, prescriptions, providers, etc. It makes it so easy to keep information on co-pays, FSA, insurances."*  
- Christina Raines, Goodman, MO

## Get The Medical Tax Deductions You're Entitled To

Quicken Medical Expense Manager helps you keep track of all your taxable health care expenses, including related mileage, so you don't miss out on medical deductions. At the end of the year, use the **Tax Deductions Report** to see what you've spent and to determine whether you're eligible.

Cost Calculator   Deductibles/OOP Max   **Tax Deductions**   Patient History   FSA

**Tax deductions**

This report totals items from types of services that may be tax deductible. Select items to total:

Date   From: 1/ 1/2005   To: 12/31/2005   Person: ☒ Not categorized, ☒ Andy, ☒ Missy   [Select All](#)   [Clear All](#)   [Display Report](#)   [Reset](#)

**Selected tax deductible expenses total \$2,007.20 + 232 miles, as follows:**

Service Date	Person	Provider	Service(s)	Pmt. Date	Payments & Reimbursements	Parking & Tolls	Mileage	
				5/4/2005	43.99			
6/28/2005	Susie	OvernetDrug	Rx:Glucophage		129.88	0.00	0	
				2/28/2005	129.88			
7/11/2005	Susie	Diagnostic Labs	Laboratory		0.00	0.00	5	
7/14/2005	Susie	OvernetDrug	Rx:pioglitazone		222.41	0.00	0	
				3/14/2005	222.41			
7/15/2005	Susie	Kulver's Drugs	Rx:Test strips		43.99	0.00	3	
				5/4/2005	43.99			
8/27/2005	Andy	Bayne, Howard	Injection		0.00	0.00	9	
8/28/2005	Andy	Tingey, Ericka	Braces		1,200.00	0.00	12	
				8/28/2005	400.00			
				9/28/2005	400.00			
				10/28/2005	400.00			
9/4/2005	Susie	Kulver's Drugs	Rx:Test strips		43.99	0.00	3	
				5/4/2005	43.99			
9/21/2005	Andy	Wright Aid	Rx:Bobotusfrin		7.99	0.00	2	
				3/21/2005	7.99			
					<b>Subtotal</b>	\$2,005.20	\$2.00	232
					<b>Total</b>	<b>\$2,007.20 + 232 miles</b>		

Know instantly how much you've spent on tax deductible medical expenses and your total mileage.

*"This sure can be a useful tool at tax time when you need to know if you have paid enough to write off and how much."*  
-Scott Wright, Oak City, UT

## **Automatically Create a Medical History For Your Entire Family**

Quicken Medical Expense Manager makes it easy to keep track of your entire family's medical and prescription history in one place.

- As you enter data into Quicken Medical Expense Manager, you'll automatically create an individual Medical and Prescription History for each person (or pet!).
- Capture health trends. See a list of past medical treatments and prescriptions.
- Print it out and take it to a new doctor.
- Sort by Person, Provider, Reason, Service and/or Dates.

The screenshot shows the Quicken Medical Expense Manager application window titled "the smiths.mem". The interface includes a menu bar (File, Edit, View, Reports, Lists, Help) and a toolbar with buttons for "Enter Expense" and "Add Reminder". Below the toolbar are tabs for "Cost Calculator", "Deductibles/OOP Max", "Tax Deductions", "Patient History" (selected), and "FSA".

On the left, a sidebar titled "Show info for:" lists family members: All, Susie, Steve, Andy, and Missy. The "Patient History" tab is active, showing a "Medical History" report. The report title is "Medical History" with a subtitle: "This report shows a Medical History without financial data, suitable for giving to medical service providers. Select items to display:". Below the title are filters for Person (Andy), Reason (Any), Date (From 1/1/2005 to 1/3/2006), and Provider (Any). A "Display Report" button and a "Reset" button are present.

The report table displays the following data:

Date of Service	Person	Provider	Reason	Service
8/27/2005	Andy	Bayne, Howard	Asthma	Injection
8/28/2005	Andy	Tingey, Ericka	Orthodonture	Braces
9/13/2005	Andy	Bayne, Howard	Asthma	Doctor visit
9/21/2005	Andy	Wright Aid	Cough	Rx:Bobotusfrin
11/30/2005	Andy	Bayne, Howard	Asthma	Doctor visit
1/3/2006	Andy	A Plus Optical	Vision	Eyeglasses

*"This is a great program to keep all of your medical expenses in one place so that it can be easily accessed when filing claims, taxes, or for asking questions with regard to your medical bills and insurance coverage. It's great if you have to keep track of multiple persons' appointments or having to use mail-order for prescriptions and refills. It is a real time saver and much easier than trying to keep track of papers or paper calendars!"*  
- Christina Raines, Goodman, MO

## Keep Track of Your Flexible Spending Accounts

The FSA Contribution Calculator takes the guesswork out of managing Flexible Spending Accounts. It helps you figure out how much to contribute based on what you spent in the past. The FSA Expense Report makes it easy to monitor what you've spent and been reimbursed to date.

**Selected FSA expenses total \$600.27, as follows:**

Service Date	Person	Provider	Reason	Service(s)	My Pmts.	FSA Status
6/18/2005	Susie	Bayne, Howard	Allergy shot	Doctor visit	20.00	FSA - Reimbursed
6/28/2005	Susie	OvernetDrug	Diabetes	Rx:Glucophage	129.88	FSA - Reimbursed
7/14/2005	Susie	OvernetDrug	Diabetes	Rx:pioglitazone	222.41	FSA - Reimbursed
7/15/2005	Susie	Kulver's Drugs	Diabetes	Rx:Test strips	43.99	FSA - Reimbursed
8/18/2005	Susie	Bayne, Howard	Allergy shot	Doctor visit	20.00	FSA - Submitted
9/4/2005	Susie	Kulver's Drugs	Diabetes	Rx:Test strips	43.99	FSA - Reimbursed
9/20/2005	Susie	Bayne, Howard	Allergy shot	Doctor visit	20.00	FSA - Submitted
10/18/2005	Susie	Bayne, Howard	Allergy shot	Doctor visit	20.00	FSA - Submitted
11/15/2005	Susie	Bayne, Howard	Allergy shot	Doctor visit	20.00	FSA - Submitted
12/20/2005	Susie	Bayne, Howard	Allergy shot	Doctor visit	20.00	FSA - Submitted
1/17/2006	Susie	Bayne, Howard	Allergy shot	Doctor visit	20.00	FSA - To Submit
<b>Total</b>					<b>\$600.27</b>	

## Quicken Medical Expense Manager is More Than Just Software

**You don't have to have the same illness to have the same needs.** Quicken Medical Expense Manager users have gathered online in the Quicken Medical Expense Manager Forum to benefit from the experience of others, ask for advice from their peers, and share their experiences. Observe or take part in this active user community at [www.quickenmedical.com](http://www.quickenmedical.com).

**Customer-Driven Innovation:** To create Quicken Medical Expense Manager version 2.0, more than 80 users were interviewed in person, by telephone, and in online meetings. Version 1.0 users also provided, and we reviewed, over 2,500 emailed comments, 700 user forum posts, and over 500 survey responses.

**Free online support:** Access our online support tool at any time and get prompt personal responses to your questions and comments.



## **The True Impact of Quicken Medical Expense Manager**

The story of Quicken Medical Expense Manager is not in its features, it's the way the product impacts the lives of the people who use it. Customer feedback has been tremendous. Throughout the guide and below are examples of what people are saying about their experiences with Quicken Medical Expense Manager.

***"You folks have gone beyond just creating a good piece of software. This software will save me so much time and money and frees me of the mental burden I've carried for so long, that you folks need to go to bed tonight knowing that you have changed some lives significantly."***

***—Francois Bonaparte, Gilroy, CA***

***"With all the new requirements for people who use Medicare, we would be lost without the comprehensive tracking accomplished by Quicken Medical Expense Manager. Thank you so much for developing a program of this quality!"***

***-Margaret Flood, Allen, TX***

***"No matter what method you use for managing your medical records, nothing takes a bigger bite out of the daunting task of record keeping like Quicken Medical Expense Manager. I was instantly satisfied!!! Thanks for a great product."***

***-Michael Lyons, Miami, FL***

***"With multiple medications and medical appointments to manage; Quicken Medical Expense Manager is a TRUE Life Saver. Quicken Medical Expense Manager does it all'. Thank you for this flawless program!!"***

***- Merle Derdall, Cheyenne, WY***

***"It is simple to use and very easy to research my records. Quicken Medical Expense Manager lets me make sense of my 1 - 2 inch medical file folder and get to information quickly rather than manually searching my thick file. It also lets me see the relationship of my expenses rather than treating each trip to the doctor as a stand alone expense."***

***—Walter Frisbie, Plainfield, IN***

***"As a Human Resource Manager, I have had experience with a variety of different EOB (Explanation of Benefit) forms and terminology, but it has been my experience that the forms and the terms confuse most people. The popup added before entering the Expense Detail screen is a good addition to Quicken Medical Expense Manager. Your brief explanation alerts those not familiar with these definitions to approach the information from a common sense perspective and provides good examples that users can relate to."***

***-Ben Hochstatter, Vinton, IA***

***"The new version of Quicken Medical Expense Manager is easy to use, allowing one to move between different windows effortlessly and quickly. Printing reports is quick and easy. All in all I would rate the product outstanding - a real help in keeping track of the day-to-day expenses of health care."***

***-Paul Bredwell, Ridgeland, SC***

***"I am really impressed with the ability to see each doctor's expenses separately as I need them. I like being able to order the reports as I need them of any combination of expenses. That will be very helpful in all the future information needs."***

***-Glenna Holiday, Merced, CA***

*All testimonials in this guide represent individual customer experiences. Intuit does not guarantee that similar results will apply to all customers.*



## **Corporate Profile**

After 20 years, Intuit continues to transform business and financial management for small businesses, accounting professionals and consumers. The company's mission is to create new ways to manage personal finances and small businesses that are so profound and simple, customers cannot imagine going back to the old way.

Intuit's "Right for My Business" strategy for small business customers delivers specially designed, industry-specific business management solutions, and develops accounting solutions for bigger, more complex businesses. Intuit also offers a broad array of tools to help businesses process payroll, manage employees, administer benefit programs and offer retirement plans. What began as small business accounting with QuickBooks® software is now a more comprehensive set of seamless services that go beyond accounting to help small businesses manage other aspects of their operation.

Intuit continues to expand its tax preparation offerings, providing powerful and easy-to-use products and services to taxpayers and accounting professionals. For individual taxpayers, Intuit offers TurboTax® software, the No. 1-selling tax software program in the U.S. and TurboTax Online for tax year 2005, the most popular online tax preparation and filing service. Intuit pioneered Instant Data Entry, which permits taxpayers to download 1099 investment data and W-2 wage data directly from the source into their tax returns. ProSeries® and Lacerte® are Intuit's industry-leading tax preparation software suites for professional accountants. One in four individual tax returns completed in the U.S. is prepared with an Intuit tax product.

Intuit remains focused on helping consumers with money management. Introduced in 1984, Quicken® software, the company's first product, has become synonymous with personal finance. Over the past two-decades, more people have bought Quicken than all other personal finance software products combined. Quicken has grown to become much more than just a checkbook register and is now an integrated family of products and services that continue to revolutionize the way people manage all aspects of both their personal and small business finances.

Founded in 1983, Intuit had annual revenue of more than \$2 billion in its fiscal year 2005. The company has nearly 7,000 employees with major offices in 13 states across the United States, and offices in Canada and the United Kingdom. More information can be found at [www.intuit.com](http://www.intuit.com).