

Business Name: \_\_\_\_\_ Your Name: \_\_\_\_\_ Year of Expenses: \_\_\_\_\_

Home Office Address: \_\_\_\_\_

**Home Office Worksheet**

Yes      No

Is the home office area used regularly and exclusively for business or the storage of inventory?  
*(If no, stop, you cannot take a home office deduction)*

Is your home office for your Sole Proprietorship or Partnership? *(If no, stop, you cannot take a home office deduction)*

**Home Office Info:**

Date of purchase *(if first year of home office)* *(Provide HUD/closing statement from the purchase)*..... \_\_\_\_\_  
 Date you began using your home office..... \_\_\_\_\_  
 Total square feet of your home..... \_\_\_\_\_  
 Total square feet of your office and/or inventory storage..... \_\_\_\_\_  
 Hours used for Daycare *(Daycare businesses only)*..... \_\_\_\_\_

**Expenses:**

Home Mortgage Interest: Provide a copy of your Form 1098 *(required)* \$ \_\_\_\_\_  
 Property taxes (if NOT on Form 1098)..... \$ \_\_\_\_\_  
 Homeowner's or Renter's Insurance..... \$ \_\_\_\_\_  
 Rent..... \$ \_\_\_\_\_  
 Repairs and maintenance to your home..... \$ \_\_\_\_\_  
 Repairs and maintenance exclusively to your office..... \$ \_\_\_\_\_  
 Utilities..... \$ \_\_\_\_\_  
     Electricity..... \$ \_\_\_\_\_  
     Natural Gas..... \$ \_\_\_\_\_  
     Propane..... \$ \_\_\_\_\_  
     Water..... \$ \_\_\_\_\_  
     Sewer (if not included in water)..... \$ \_\_\_\_\_  
 Trash/Recycling..... \$ \_\_\_\_\_  
 Association dues..... \$ \_\_\_\_\_  
 Security System..... \$ \_\_\_\_\_  
 Internet *(no phone or cable charges AND not previously claimed on another worksheet)*..... \$ \_\_\_\_\_  
 Snow removal *(if clients/customers regularly visit your home or daycare service)*..... \$ \_\_\_\_\_  
 Lawn Care *(if clients/customers regularly visit your home or daycare service)*..... \$ \_\_\_\_\_  
 Blacktop sealant *(if clients/customers regularly visit your home or daycare service)*..... \$ \_\_\_\_\_  
**Other:**  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

*If you own your home, we will allocate a portion of your mortgage interest & property taxes to your home office. If you have a home office for your corporation, please ask us about setting up an accountable plan for these expenses.*

I certify that the above information is true and correct and I have the documentation supporting my responses:

\_\_\_\_\_  
**Prepared by**

\_\_\_\_\_  
**Date**