

Client Name: \_\_\_\_\_ Business 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, All Information Required:**

Date of purchase (Provide HUD/closing statement from the purchase) ..... \_\_\_\_\_  
Purchase price..... \_\_\_\_\_  
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 home office..... \$ \_\_\_\_\_  
Utilities:  
Electricity..... \$ \_\_\_\_\_  
Natural Gas..... \$ \_\_\_\_\_  
Propane..... \$ \_\_\_\_\_  
Water & Sewer ..... \$ \_\_\_\_\_  
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.

Signature

Date

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