

Client Name: _____ Business Name: _____ Year of Expenses: _____

Home Office Address: _____

Home Office Worksheet

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)

Yes No
☐ ☐

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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