



HOME OFFICE WORKSHEET

Please include this completed worksheet with your other tax information.

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In order to qualify to claim a home office deduction, you must meet the following criteria:

1. You have a dedicated office space. It does not have to be a full room, as long as the area is a clearly dedicated for office usage. The guideline states the office must be "regularly and exclusively" used for business, so it cannot be the dining table that is cleared away to use for meals when not working, for example.
2. If you are an employee (pay reported via W-2), then you must be required (not just allowed) by your employer to work from home. Your working from home must be for your employer's convenience, not your own convenience with the employer's approval.

Please provide the following information to calculate your home office deduction:

Square footage of your office space: _____ Square footage of your home: _____

Date the home office usage began: _____

INDIRECT EXPENSES:

Please indicate whether the following are ANNUAL or PER MONTH amounts.

- Mortgage Interest paid: (from your 1098 form) _____
- Property taxes paid: _____
- Rent paid: _____ monthly annually
- Home/Renter's insurance paid: _____ monthly annually
- Utilities:
 - Electricity _____ monthly annually
 - Water _____ monthly annually
 - Gas _____ monthly annually
 - Trash _____ monthly annually
- Other expenses:
 - HOA _____ monthly annually
 - House cleaner _____ monthly annually
 - Security _____ monthly annually
 - Pest control _____ monthly annually
 - Other: _____ monthly annually

DIRECT EXPENSES:

If you had to spend money to set up, equip or repair your home office space, please indicate here:

- Repairs _____ Furniture _____
- Equipment _____ Office supplies _____
- Other _____

