

## HOME OFFICE ORGANIZER

An in-home office must be used exclusively and regularly for business purposes. This deduction is available only to self-employed taxpayers whose home office is their primary place of business. There are limited exceptions to the primary place requirement.

If you are a first-time client and previously claimed a home office, we need to collect the **prior year depreciation schedule**. This may require you to contact your prior preparer.

My home office at \_\_\_\_\_ (street address) qualifies.

Signature: \_\_\_\_\_

### Annual Information Required:

1. If this home is mortgaged please list the lender and last four of your account numbers:

Mortgage Lender

Last Four Digits

a. \_\_\_\_\_

\_\_\_\_\_

b. \_\_\_\_\_

\_\_\_\_\_

- |  |          |
|--|----------|
| 2. Rent paid (if renting)                                      | \$ _____ |
| 3. Real Estate Taxes Paid                                      | \$ _____ |
| 4. Homeowner's/Renter's Insurance Paid                         | \$ _____ |
| 5. Repairs & Maintenance Paid                                  | \$ _____ |
| 6. Homeowner's Association (HOA) Dues Paid                     | \$ _____ |
| 7. Utilities Paid:   |          |
| a. Electricity   | \$ _____ |
| b. Gas   | \$ _____ |
| c. Sewer & Trash   | \$ _____ |
| d. Water   | \$ _____ |
| e. Telephone   | \$ _____ |
| (do not include the cost of the first land line into the home) |          |
| f. Internet  | \$ _____ |
| g. Cell Phone (business use portion only)                      | \$ _____ |

### **Setup and Home Purchase Information:** (For first time users or changes only)

1. Square Footage of 100% Dedicated Space: \_\_\_\_\_ sq ft / Total: \_\_\_\_\_ sq ft
2. Date the home began to function as an in home office: \_\_\_\_\_
3. What is your cost in the home \$ \_\_\_\_\_  
(purchase price + closing costs + major improvements since purchase)