

Educator Deductions

Client's Name: _____

Tax Year: 20_____

The purpose of this worksheet is to help you organize your tax deductible business expense. In order for an expense to be deductible, it must be considered an "ordinary and necessary" expense. You may include other applicable expenses. Do not include expenses for which you have been reimbursed, expect to be reimbursed, or are reimbursable.

Classroom Aids	
Attendance Books	
Arts & Crafts	
Audio Visual	
Books	
Decorations	
Food	
Grade Books	
Rentals	
Software	
Film/Processing	
Photocopying	
Printing	
Publications	
Party Supplies	
Tools	
Trophies	
Prizes & Awards	
Stationery	
Other: _____	
Other: _____	
Professional	
Conventions	
Dues	
E & O Insurance	
Job Seeking	
Legal Fees	
Licenses	
Memberships	
Seminars	
Continuing Education	
Resumes	
School Functions	
Other: _____	
Other: _____	

Telephone	
Long Distance	
Faxes	
Pay Phone	
Cellular (Base Fees)	\$480.00
2nd Line	
Beeper/Pager	
Answering Service	
Other: _____	
Other: _____	

Equipment	
Calculator	
Camera	
Desk	
Chair	
Filing Cabinet	
Cell Phone Purchase	
Tape Recorder	
Other: _____	
Other: _____	
Uniforms	
Dry Cleaning	
Laundry	
Lab Coats	
Other: _____	
Other: _____	

Miscellaneous	
Postage	
Storage	
Other: _____	
Other: _____	
Other: _____	
Other: _____	

The IRS/FTB requires that the taxpayer(s) be advised that it is their individual responsibility to keep or maintain actual receipts and completed personal checks used for the acquisition of any item or services expensed on their individual income tax return. While Lopez & Associates Income Tax Services does not require to view these receipts/invoices/checks, it will be necessary to produce these receipts if audited or questioned by the IRS/FTB to prove the expenses.

Print Name

Signature

Date