

HOME OFFICE ORGANIZER

An in-home office must be used exclusively and regularly for business purposes. Under the Tax Cuts & Jobs Act (tax years 2018-2025) this deduction is available only to self-employed taxpayers whose home office is their primary place of business. Please give us a call/email at your convenience to discuss/plan a consultation.

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)