

HOME OFFICE ORGANIZER

An in-home office must be used exclusively for business purposes on a regular basis in connection with your employer's business and for your employer's convenience. If you are self-employed it must be your principal place of business or be used to produce income. 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 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. Homeowner's/Renter's Insurance Paid

\$ _____

4. Real Estate Taxes Paid

\$ _____

5. Homeowner's Association Dues Paid

\$ _____

6. 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)

\$ _____

7. Repairs & Maintenance Paid

\$ _____

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)