



PESHKEFINANCIAL

Making Finances Simple. Changing Lives.

HOME OFFICE WORKSHEET: _____ tax year

STEP 1: Determine how you'll be able to complete this worksheet

- **Mac Users:** You likely cannot use the "Fill-In" feature. If so, you'll have to print & manually complete entries.
- **Others:** You should be able to use "Fill-In" feature. Before beginning, save file to your desktop with new name.

STEP 2: Understand IRS rules on Home Office deduction eligibility

- A home office area must be used exclusively & regularly for business. A valid home office is used routinely for work and can't also have any personal use (*i.e. - spare bedroom used for work & guest stays does NOT qualify*).
- Home office space must be a separate identifiable space, but it does NOT necessarily need to be marked off by a permanent partition (*i.e. - room with four walls and a door*).

STEP 3: Complete sections below, as follows

- If you have multiple home offices (*i.e. - you moved mid-year*), use a separate worksheet for each home office.
- If multiple businesses/taxpayers share the same home office listed on this sheet, allocate % share below.
- Enter full home expense figures using annual amounts. We'll calculate home office portion figures for you.

HOME OFFICE CERTIFICATION:

I/We Certify Viewing Step 2 (<i>above</i>) in this Document Regarding Home Office Eligibility.	<input type="checkbox"/> Yes <input type="checkbox"/> No
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HOME OFFICE INFORMATION:

Property Address, City, State, Zip	
Home Office Start Date/End Date (<i>"present" if still used</i>)	/
<u>Total Home Area</u> (<i>square feet</i>)	
<u>Home Office Area</u> (<i>square feet</i>)	

BUSINESS(ES) THAT USE THIS HOME OFFICE:

BUSINESS #1:

BUSINESS #2:

Business Owner's Last Name, First Name		
Business Name (<i>if applicable</i>)		
Business Profession (<i>product/service description</i>)		
Business Allocation Percentage	%	%

HOME OFFICE EXPENSES:

Home Insurance (<i>hazard, flood, earthquake, liability, etc.</i>)	\$
Rent Paid (<i>for <u>renters only</u>; do <u>NOT</u> include mortgages</i>)	\$
Repairs/Maintenance	\$
Utilities (<i>gas, electric, water, trash, etc.**</i>)	\$
House Cleaning / HOA Dues	\$ / \$

Any expenses incurred directly related to home office only (*ceiling fan installed in home office, etc.*)? If yes...list date purchased, item description, cost:

** List internet/phone separately on business owner worksheet. Do NOT enter as utility on this Home Office sheet.