

SECTION 5: BUSINESS WORKSHEETS – For Employees, Self-Employed, & Rental Property Owners

MOVING EXPENSES WORKSHEET		TRAVEL (AWAY FROM HOME) WORKSHEET	
for <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse		for <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse	
# of Miles from old home to new work place		Airfare, Train, etc.	\$
# of Miles from old home to old work place		Car (see Vehicle Worksheet)	\$
Difference (miles)		Car Rental, Gas, etc.	\$
Packing & Transportation (household goods)	\$	Taxi, Bus, Shuttle,	\$
Storage	\$	Parking & Tolls	\$
Insurance	\$	Lodging	\$
Travel by Airfare, Train, etc.	\$	Meals (including tips)	\$
Travel by Car		Laundry, Cleaning, etc.	\$
Parking & Tolls	\$	Skycap, Bellhop, etc.	\$
# of Miles or		Total	\$
Gas & Oil	\$	Reimbursement Amount	\$
Lodging Expenses (excluding meals)	\$	<input type="checkbox"/> This amount is shown on my W2.	
Other	\$		
Other	\$	# of days away from home	
Total	\$	# of days to use per diem rate instead of actual expenses	

HOME OFFICE USE WORKSHEET for <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse					
Gross Income					\$
Date First Started Home Office					
Total Area of Home					ft ²
Area Used for Office Area					ft ²
Area Used for Storage & Inventory					ft ²
Home Office Used is used <input type="checkbox"/> regularly & exclusively in my trade or business.					
purpose <input type="checkbox"/> employer's convenience <input type="checkbox"/> self employment <input type="checkbox"/> daycare facility					
Expenses	Indirect	Direct	Expenses	Indirect	Direct
Real Estate Tax	\$	\$	Repairs & Maintenance	\$	\$
Mortgage Interest	\$	\$	Utilities	\$	\$
Mortgage Interest Premiums	\$	\$	Casualty Loss	\$	\$
Insurance	\$	\$	Carryovers	\$	\$
Rent	\$	\$	Other	\$	\$

PURCHASE OF BUSINESS ASSETS (equipment, furniture, tools, computers, software, improvements, etc. with a useful life of more than one year) – Enclose receipts or contracts of purchases made in 2009. New clients should also provide detailed listing of all business assets including previously claimed depreciation.				
Description of Asset	Activity	% Business Use	Date Acquired	Purchase Price
	<input type="checkbox"/> Business <input type="checkbox"/> Rental			\$
	<input type="checkbox"/> Business <input type="checkbox"/> Rental			\$
	<input type="checkbox"/> Business <input type="checkbox"/> Rental			\$

DISPOSITION OF BUSINESS ASSETS – List assets removed from business use during the year including previously inventoried items donated to charity. Enclose sale receipts, contracts, depreciation history, etc.					
Description of Asset	Disposition (Sold, Retired, Scrapped, Abandoned, etc.)	Date Acquired	Purchase Price	Disposition Date	Sales Price or Other Basis
			\$		\$
			\$		\$
			\$		\$