

STOP!!!!

Only fill out this worksheet if you are a **self-employed** Educator and do not receive W-2 as an Educator!

OR

If you receive W-2 income in one of the following States:

AL, AK, CA, HI, IA, MN, NY, & PA as an Educator!

Notes for special situations:

- **If you are both self-employed and receive a W-2 as an Educator from one of the above - mentioned states** - You must complete two copies separating self-employment expenses and travel from W-2 expenses and travel.
- **If both of you and your spouse are self-employed** – Fill out a separate worksheet for each of your businesses. If you have some shared experiences, like internet access for example, just write the word “shared” or “both” next to the expense
- **If you have an expense that relates to your W-2 work and your Non-W-2 self-employment** – Fill in only the amount that applies to your self-employment, or if unsure how to allocate just put a ? besides the number and we'll review it with you.
- Do not send receipts with your worksheets. Keep them in your file at home.

Lincoln Tax Professionals, LLC

Matthew P Lincoln, EA Ryan Jenkins, EA

301-371-5104 (Phone) 888-897-4080 (Fax)

office@lincolntax.com

Taxpayer's Name _____

Tax Year _____

Educator Expense Worksheet

We will need the following items to prepare your tax return. Please list all business expenses.

Income Received (the total of ALL Non-W2 income): \$ _____

Stimulus Relief Payments received in 2020: PPP Loans \$ _____ EIDL Loan \$ _____

General Expenses

	Cost		Cost
Tax Preparation	\$ _____	Internet Access	\$ _____
Personal land line phone (Total Year)	\$ _____	Cell Phone (Total Year, Your Line Only)	\$ _____
What % do you use land line for business?	_____ %	What % do you use cell phone for business?	_____ %

Business Insurance (Not vehicle or health)

	Cost		Cost
Liability Insurance	\$ _____	_____	\$ _____
Workman's Compensation Insurance	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

Supplies

	Cost	Related Mileage		Cost	Related Mileage
Books and Publications (For the classroom)	\$ _____	_____	Other Teaching supplies (Markers, project supplies...)	\$ _____	_____
Classroom Decor	\$ _____	_____	Student Supplies (paper, pencils, folders)	\$ _____	_____
Film & Developing	\$ _____	_____	DVD/Video Rental/Purchase	\$ _____	_____
Incentives and Awards	\$ _____	_____	_____	\$ _____	_____
Incidental Supplies (Kleenex, fish-food...)	\$ _____	_____	_____	\$ _____	_____
Office Supplies	\$ _____	_____	_____	\$ _____	_____

Computer and Other Equipment

List each item over \$2,500 separately. Combine smaller items.

	Cost	Related Mileage		Cost	Related Mileage
Small Tech & Equipment (Total all items under \$2,500)	\$ _____	_____	_____	\$ _____	_____
Computer Software / Upgrades (Include Anti-virus - Security)	\$ _____	_____	_____	\$ _____	_____
Web/Domain Fees	\$ _____	_____	_____	\$ _____	_____

Professional Expenses

	Cost	Related Mileage		Cost	Related Mileage
Business Meals Local	\$ _____	_____	PTA, Social Committees, and other Professional Organization Dues.	\$ _____	_____
Meeting Expenses	\$ _____	_____	_____	\$ _____	_____
Business Meals Overnight (See Travel Chart)			_____	\$ _____	_____
Business Gifts (\$25/person/year)	\$ _____	_____	_____	\$ _____	_____
Equipment Repair	\$ _____	_____	_____	\$ _____	_____
Field Trips Preview / Admissions	\$ _____	_____	_____	\$ _____	_____
Union Dues	\$ _____	_____	_____	\$ _____	_____
Coaching Gear/Supplies	\$ _____	_____	_____	\$ _____	_____
School Clothes with Logo	\$ _____	_____	_____	\$ _____	_____
Job Hunting or Portfolio Expenses	\$ _____	_____	_____	\$ _____	_____

Continuing Education & Graduate School

	Tuition Paid By You	Tuition Reimbursed	Books and Supplies	# of Trips	Mileage One Way
Spring	\$ _____	\$ _____	\$ _____		
Summer	\$ _____	\$ _____	\$ _____		
Fall	\$ _____	\$ _____	\$ _____		
Other	\$ _____	\$ _____	\$ _____		

Other Mileage – If your business has multiple vehicles please ask us for our Vehicle Chart

	Related Mileage		Related Mileage
Return trips to school (PTA, Back to School, Events)	_____	Coaching / Advising / Chaperoning	_____
In-service Meetings / Training	_____	Coaching etc. - To Practice	_____
Trips to Board of Education / HR	_____	Coaching etc. - Scouting	_____
Trips to to Library / Media Center	_____	Coaching etc. - Meetings / Clinics	_____
Union & Other Professional Meetings	_____	Coaching etc. - Games	_____
Mileage to second job (coaching at another school or other job)	_____	_____	_____
Temporary job (Summer) - if out of the area	_____	_____	_____

Total vehicle mileage for the whole year
(Odometer on Dec 31 minus Odometer on Jan 1) _____

Total miles spent on regular daily commute _____

<i>Office Use Only – Total Related Mileage</i>

Travel Chart Category expenses should be totaled per trip

# of <u>DAYS</u> Gone Over Night	City/State	Expenses from Plane, Train, Subways, Rental Car, Taxi, Uber, Lyft	Lodging Expenses	Tolls Parking	Miles Driven in Personal Vehicle	Amounts Reimbursed , If Any, or NONE	Office Use Only
		\$	\$	\$		\$	
		\$	\$	\$		\$	
		\$	\$	\$		\$	
		\$	\$	\$		\$	
		\$	\$	\$		\$	
		\$	\$	\$		\$	
		\$	\$	\$		\$	
		\$	\$	\$		\$	

Office in Home

Not everyone qualifies to take an office in home deduction. You must work from home for the convenience of your employer AND not have a dedicated office space you could go in and work at. Ask us if you think you qualify.

Mortgage Interest	Bring your End of Year 1098 Mortgage Statement	Utilities: Combined yearly TOTAL of Water, Sewer, Electric, Gas, Oil, etc.	\$
Total Rent Paid For the Year	\$	Repairs & Maintenance to the office space	\$
Homeowners/Renters Insurance	\$	Repairs & Maintenance to your home	\$
HOA/Condo Association Fees	\$	Improvements to the office space	\$
Trash Pick-up	\$	Improvements to your home	\$
Security	\$		
Square footage of office space (including storage)	FT ²	Square footage of the finished space in your home including the office space.	FT ²

If you move during the year please separate your Home Offices

Date you moved into your new residence: _____

Mortgage Interest NEW HOME	Bring your End of Year 1098 Mortgage Statement	Utilities: Combined yearly TOTAL of Water, Sewer, Electric, Gas, Oil, etc.	\$
Total Rent Paid For the Year	\$	Repairs & Maintenance to the office space	\$
Homeowners/Renters Insurance	\$	Repairs & Maintenance to your home	\$
HOA/Condo Association Fees	\$	Improvements to the office space	\$
Trash Pick-up	\$	Improvements to your home	\$
Security	\$		
Square footage of office space (including storage)	FT ²	Square footage of the finished space in your home including the office space.	FT ²

