

Home Office Details Worksheet

For your accountant or tax preparer — Canada & United States

Your Information

Your name

Business name

Tax year

Country

☐ Canada

☐ United States

Home Office Details

Used to calculate your business-use percentage (CRA Form T2125 line 9945 / IRS Form 8829).

Total home square footage

Office square footage

Do you own or rent your home?

☐ I own my home

☐ I rent my home

U.S. filers only — which method do you expect to use?

☐ Simplified method (\$5/sq ft, max 300 sq ft) — you can skip the expense table below

☐ Regular method (actual expenses) — please complete the expense table below

☐ Not sure — let my preparer decide

Annual Home Expenses

Enter your total annual home expenses below. Your preparer will prorate these by your business-use percentage. Leave a line blank if it doesn't apply to you.

CATEGORY	ANNUAL AMOUNT
Heat / utilities	\$
Home insurance	\$
Mortgage interest	\$
Property taxes / real estate taxes	\$
Rent (if you rent your home)	\$
Maintenance and repairs	\$
Other home expenses — describe	
Other home expenses — amount	\$

Notes for Your Accountant

Anything else your accountant should know? (e.g. more than one work space, daycare use, partial-year use, a move during the year)