File 4 Me Tax and Financial Services

Unreimbursed Expenses From Your Employer Worksheet

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Client Initials

Ordinary and necessary job expenses which were not reimbursed to you from your employer are deductible. An ordinary expense is one that is common and accepted in the line of work you are in. A necessary expense is one that is helpful and appropriate for work. An expense does not have to be required to be considered necessary.

This worksheet is for those that are paid through payroll and have tax withheld from your paycheck. Below is a list of the most common unreimbursed expenses.

Note: ***Bring your invoices, bank/CC statements ,receipts ,payroll info.,etc. so we may properly prepare your return.***

Please use a separate page for Taxpayer / Spouse ☐ Taxpayer ☐ Spouse

Business Liability Insurance Premiums..... $ _____

Causality & Theft of Property used in preforming services as an employee..... $ _____

Computer purchased - required by employer ~ date of purchase..... $ _____

Mobile Phone purchased - required by employer ~ date purchased..... $ _____

Dues to professional organizations and chamber of commerce if work related..... $ _____

Education expenses related to work..... $ _____

Legal fees related to work..... $ _____

Licenses and regulatory fees..... $ _____

Malpractice insurance..... $ _____

Occupational taxes..... $ _____

Passport for business trip..... $ _____

Physical examinations required..... $ _____

Protective clothing required for work such as hard hat, safety shoes, glasses, etc..... $ _____

Safety equipment required for work..... $ _____

Subscriptions to professional journals and trade magazines related to work..... $ _____

Tools and supplies used for work..... $ _____

Uniforms required by employer that are not suitable for ordinary wear, also the cost of upkeep..... $ _____

Union dues and expenses..... $ _____

Mobile Phone...Total for the Year..... $ _____

% used for work_____

Internet...Total for the Year..... $ _____

% used for work_____

MILES:

Any miles that you drove for your employer that you were not reimbursed for or a portion was not reimbursed. Do not include regular commuting miles to and from your normal place of employment. Please fill out a mileage/expense log.

Total unreimbursed miles _____

HOME OFFICE:

A home office is deductible if required by your employer. Please use the Home Office section on the Business Worksheet.

Check here if claiming Home Office ☐