

Tax Matters

2052 Newport Boulevard, Suite 6, Costa Mesa, California 92627-7158



EDUCATOR DEDUCTIONS

Client: _____ ID#: _____ Tax Year: _____
 CA Credential # _____
 Issued (month/day/year) _____

The purpose of this worksheet is to help you organize your tax deductible business expenses and **maximize your deductions**. In order for an expense to be deductible, it must be considered an "ordinary and necessary" expense. You may include other applicable expenses. Do not include expenses for which you have been reimbursed, expect to be reimbursed, or are reimbursable.

Classroom Aids		Professional		Continuing Education	
	Arts & Crafts		Admissions to School Functions		Artist Series
	Attendance Books		Admissions to Student Activities		CE for License Renewal
	Audio Visual		Am Choral Directors Association		Classroom Art Shows
	Books		Assoc Supervision Curriculum Dev		Concerts
	Decorations		Attorney/Job & Salary Protection		Ed Registration Fees
	Film/Processing		Bond for Sabbatical Leave		Education - Books
	Food		Career Consultants/Counseling		Educational - Activities
	Grade Books		Clerical Services		Educational - Clinics
	Party Supplies		Credential Renewals		Educational - Conventions
	Pens & Pencils		Dues - Associations		Educational - Institutes
	Photocopying		Dues - Chapters		Educational Research
	Printing		Dues - Professional Societies		Films
	Prizes & Awards		E & O Insurance		Lectures
	Publications		Employment Agency		Performances
	Rentals		International Educators		Professional Development
	Software		International Reading Association		Seminars
	Stationery		Job Seeking		TOTAL
	Teaching Aids - Equipment		Licenses		Uniforms
	Teaching Aids - Films		Malpractice Insurance		Clothing/Special Use
	Teaching Aids - Materials		Memberships		Dry Cleaning & Laundry
	Teaching Aids - Slides		Music Educators Nat'l Conference		Lab Coats
	Tools		National Education Association		Uniforms
	Trophies		National Educators		TOTAL
	TOTAL		Nat'l Assoc School Psychologists		Telephone
	Equipment		Physical - Employer Required		2nd Line
	Calculator		Recertification		Answering Service
	Camera		Resumes		Beeper/Pager
	Cell Phone		Substitute Teacher Payments		Cellular
	Chair		Union Dues		Fax Line
	Computer		Vocational Industrial Clubs of Am		Fax Transmissions
	Computer - Other Supplies		Other		Long Distance/Toll Calls
	Desk		TOTAL		Paging Service
	Equipment Cleaning		Publications		Pay Phones
	Filing Cabinet		Journals		TOTAL
	Professional Equipment		Magazine Subscriptions		Miscellaneous
	Professional Tools		Newspapers Subscriptions		Gifts to Staff
	Tape Recorder		Professional Journals		Office Supplies
	TOTAL		Professional Publications		Postage
	Vehicle & Travel		Publications - Technical Books		Resumes
	See Vehicle & Travel Worksheet		Publishing Expenses		Stationery
	EQ Depr (Prior Years)		Trade Publications		Storage
	EQ Purchased (This Year)		Other		Typing/Writing Expenses
	Prof Library Depr (Prior Yrs)		TOTAL		TOTAL