

# CODE- 4 TAX SERVICES

MAILING ADDRESS: 22431 Antonio Parkway B160-482, Rancho Santa Margarita, CA 92688 \* 949-364-2121 \* www.code-4tax.com \* Fax 877-794-9998

## PROFESSIONAL EDUCATOR/TEACHER DEDUCTIONS FOR TAX YEAR: \_\_\_\_\_

This form is to be used in conjunction with the General Information Worksheet. Please complete all information as thoroughly as possible. If sending supporting documentation, send photocopies only. Keep all receipts and documentation used to prepare this form in a safe location for 5-7 years. Please write legibly. Use separate sheet if needed.

NAME: \_\_\_\_\_ NEW CLIENT \_\_\_\_\_ RETURNING CLIENT \_\_\_\_\_ ADDRESS CHANGED? Y \_\_\_\_\_ N \_\_\_\_\_  
ADDRESS: \_\_\_\_\_ PHONE: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

### PROFESSIONAL DUES

Union dues \_\_\_\_\_  
Professional associations \_\_\_\_\_  
Other associations \_\_\_\_\_  
Prof. license renewals \_\_\_\_\_  
Professional insurance \_\_\_\_\_

### UNIFORMS/SCHOOL SPIRIT WEAR

(Note: this category is only deductible if the clothing items are logo'd or designed such that it is not reasonable to wear them outside of work.)

Boots/shoes \_\_\_\_\_  
Lab jackets/smocks \_\_\_\_\_  
Logo shirts/hats \_\_\_\_\_  
Dry cleaning/laundry \_\_\_\_\_  
(include uniforms/logo wear only)  
School Uniforms \_\_\_\_\_  
Tailoring/alterations \_\_\_\_\_

### SUBSCRIPTIONS / PUBLICATIONS

Magazines/subscriptions \_\_\_\_\_  
Teaching journals/resources \_\_\_\_\_  
Reference books \_\_\_\_\_  
Software/downloads \_\_\_\_\_  
Training materials \_\_\_\_\_  
Apps \_\_\_\_\_

### JOB SEEKING EXPENSES

Airfare/auto rental \_\_\_\_\_  
Lodging/parking \_\_\_\_\_  
Resume/transcripts \_\_\_\_\_  
Meals \_\_\_\_\_

### HOME OFFICE

Please use the Home Office Worksheet

### CLASSROOM EQUIPMENT / SUPPLIES

Equipment:  
Laptop/computer \_\_\_\_\_  
Ipad/Ipod/Tablet \_\_\_\_\_  
Accessories \_\_\_\_\_  
Projector/display equipment \_\_\_\_\_  
Camera & equipment \_\_\_\_\_  
Accessories & supplies \_\_\_\_\_

Other supplies:  
Lab ear/eye protection \_\_\_\_\_  
Gloves/protective wear \_\_\_\_\_  
Carry cart/supply organizers \_\_\_\_\_  
Classroom supplies \_\_\_\_\_  
Classroom organizers/furn. \_\_\_\_\_  
Daytimer/planner \_\_\_\_\_  
Printing/copies/binding \_\_\_\_\_  
Software \_\_\_\_\_  
DVDs/CDs/Tapes \_\_\_\_\_  
Books for classroom \_\_\_\_\_  
Other/miscellaneous \_\_\_\_\_

Were any of the items above reimbursed or did you receive any stipends, grants or other money used to purchase these items?

Y \_\_\_\_\_ N \_\_\_\_\_

If Yes, what amount did you receive? \$ \_\_\_\_\_

Cell phone purchase \_\_\_\_\_  
Percentage business use \_\_\_\_\_ %  
Cell phone service \_\_\_\_\_  
Cell phone accessories \_\_\_\_\_  
Internet service (total per yr) \_\_\_\_\_  
Percentage business use \_\_\_\_\_ %

### EDUCATION/TRAINING/ CONFERENCE EXPENSES

(Attach any 1098-T Forms received.)

Is education work-related? Y \_\_\_\_\_ N \_\_\_\_\_  
Books, papers, pens \_\_\_\_\_  
Parking fees \_\_\_\_\_  
Tuition/Registration/fees \_\_\_\_\_  
Hotel/out of pocket \_\_\_\_\_  
Lab fees/supplies \_\_\_\_\_

(Note: please indicate if education expenses are for spouse or dependent. If more than one person, list costs separately for each person.)

### AUTO MILEAGE

(Indicate if miles are by week, month or year)

Commuting \_\_\_\_\_ per \_\_\_\_\_  
Non-Business/Personal miles \_\_\_\_\_

Business:  
Meetings/other asgnmts \_\_\_\_\_ per \_\_\_\_\_  
Supplies stores \_\_\_\_\_ per \_\_\_\_\_  
Job-seeking \_\_\_\_\_ per \_\_\_\_\_  
Education Miles \_\_\_\_\_ per \_\_\_\_\_  
Conference Miles \_\_\_\_\_ per \_\_\_\_\_

#### **Code-4 Tax Services e-file & payment policy:**

Returns will be e-filed at no extra charge. E-files will not be submitted until signed acknowledgment & payment are received. Payment can be made by cash, check, Visa, Mastercard, Discover, American Express or Square Cash transfer. Mail-in Clients: a secure pay link will be sent to you if you prefer to pay by credit card.