



Educator Deductions

Client _____ ID# _____

Advisor _____ Tax Year _____

The purpose of this worksheet is to help you organize your tax-deductible business expenses. 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.

| Description | Amount |
|--|-----------|
| Classroom supplies, Awards, Prizes, Plants, Paintings, etc. | \$ |
| Clothing, Shoes, and Accessories (Special use for Gym or Lab) | \$ |
| Continuing Education | \$ |
| Credential Renewal | \$ |
| Depreciation of Equipment - To IRS Form 4562 (Piano, Camera, Projector, File Cabinets, Etc.) | \$ |
| Equipment such as Calculator, Film, and Processing | \$ |
| Entertainment/Meals | \$ |
| Internet | \$ |
| Meetings and Conventions | \$ |
| Occupation License and Renewals | \$ |
| Office Supplies, Postage, Stationery | \$ |
| Printing and Copying | \$ |
| Professional Society Dues and Expenses | \$ |
| School Functions and Admissions | \$ |
| Teaching Aids, Films, Slides, Etc. | \$ |
| Telephone, Pager, Fax | \$ |
| Trade Publications and Periodicals | \$ |
| Travel expenses to attend meetings at other schools, transport students to sporting events, or field trips | \$ |
| Typing and Clerical Services | \$ |
| Uniforms | \$ |
| Union Dues | \$ |
| Union Meetings and Expenses | \$ |
| Writing and Publishing | \$ |
| TOTAL | \$ |

Please list any additional items. and amounts on another sheet.

INCOME TAX INFO

If member was on payroll deduction for the entire calendar year 2018, they paid dues as follows:

PCTA

| | | |
|---|---|----------|
| 11 Deductions @ \$32.90 (1/5/18 – 5/25/18) | = | 361.90 |
| 9 Deductions @ \$33.90 (8/31/18 – 12/21/18) | = | 305.10 |
| Total Dues Paid, 20 Deductions total | = | \$667.00 |
| Total dues paid for tax purposes: | | \$667.00 |

PESPA

| | | |
|--|---|----------|
| 20 Deductions @ \$16.46 (1/12/18 – 12/28/18) | = | \$329.20 |
| Total Dues Paid, 20 Deductions total | = | \$329.20 |
| Total dues paid for tax purposes: | | \$329.20 |