Your 2016 W2 Employee
Work-Related Expenses Worksheet

Please fill out completely and NEVER use any expense more than once.

These deductions will not help you if you do not have enough deductions to itemize (Itemized Deduction worksheet).

Do not include Self-Employed Business, Farm or Rental Expenses.

Best number to reach you: _____

Reimbursements: Were you reimbursed for any expenses? ☐Yes or ☐No

If Yes, was the reimbursement reported on your W2? ☐Yes or ☐No

This worksheet is for expenses that have NOT been reimbursed

OR the expenses were reimbursed, but the payment for reimbursement was included in gross income on your W2.

Employee Expenses:

Parking, Local Transportation & Tolls $ _____

Lodging, Airfare, Car Rental, Tips $ _____

Work Gifts ($25 or less per person) $ _____

Trade & Professional Publications $ _____

Work-Related Local Meals $ _____

Receipt & documentation of business purpose required.

Meals - For travel as an employee only. _____ $

Please list number of nights away & dates for each city/state.

Legal Fees $ _____

Attorney fees and court costs for unlawful discrimination only.

Work-Related Insurance $ _____

Materials & Supplies $ _____

Work-Related Education $ _____

Job Seeking Costs $ _____

Professional Licenses $ _____

Work Telephone $ _____

Uniforms $ _____

Must not be adaptable to general use or able to take the place of regular clothing.

Other Dues & Fees: $ _____

Union Dues go on your Itemized Deduction worksheet.

If you are required by your employer to have an office at home or have no other place to accomplish your work, we can probably save you even more tax if you fill out a Home Office Worksheet.

Employee Vehicle Expenses:

Include mileage between jobs on the same day in Work Trip miles, but not mileage to and from your home.

*If you are claiming employee business mileage, we **must** have the following information to complete your return:*

1. Vehicle Make/Model: _____
2. Date you began using this vehicle for this W2 job: _____
3. Total Annual Miles: _____miles
4. Work Trip Miles included in #3: _____miles

Do you have evidence to support this deduction? ☐Yes or ☐No

Is the evidence written? ☐Yes or ☐No

Do you have another personal vehicle? ☐Yes or ☐No

Other Expenses:

If you can't categorize an expense, describe it on the back with cost. We'll use it if possible.