

Home-Office Documentation Workbook

Document the space, business use, dates, direct costs, shared costs, and supporting evidence relevant to a home-office review.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid RiskWise engagement.

What this free resource includes

- 01 Workspace and use
- 02 Business-use facts
- 03 Direct expenses
- 04 Shared expenses
- 05 Evidence and advisor questions

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through Home-Office Documentation Workbook

Record what is known, identify the source, assign an owner, and make missing information visible.

Workspace and use

Purpose / facts / owner / evidence / date:

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Business-use facts

Purpose / facts / owner / evidence / date:

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Direct expenses

Purpose / facts / owner / evidence / date:

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Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Shared expenses

Purpose / facts / owner / evidence / date:

Evidence and advisor questions

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	RiskWise can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: Home-Office Documentation Workbook

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