REAL ESTATE AGENT WORKSHEET

Taxpayer Name:		Social Security #	
Name of Associated Broker		Date of License	
Gross Income / Commissions (please provide 1099's)			$

ADVERTISING		EXPENSE RELATED TO REAL ESTATE AGENT			
Signage		Legal & Professional Fees		Office Supplies	
Direct Mail		MLS Fees		Business Insurance	
Flyers		Rent - At Main Office		Dues and Publications	
Business Cards		Office Fees		Postage/Shipping	
Promotional Items		Utilities (outside of home)		Telephone (2nd line in Home)	
Print Advertising		Secretarial Expenses		Cell Phone Service	
Classified Ads		Copying Expenses		Internet Service Fees	
Misc Advertising		Printing Costs		Professional Org Fees	
If you completed the Home Office Expense Section, the Vehicle Expense Section, Equipment Purchased Section of the "Self Employed" section of the Tax Organizer, you do not need to complete them on this page. The expenses listed here are specific to Real Estate Agents and are not listed in prior areas of the Tax Organizer.		Bank Charges		Community Org Fees	
		Errors/Omissions Insurance		Courier Service Fees	
		Meals		Keys & Locksmith	
		Client/Closing Gifts		Lock Boxes	
		Travel Expenses		Photographs (film)	
		Client Entertainment		Open House Expenses	
		Professional Conference Fees		Referral Fees	
		Continuing Education Fees		Software	
		Other:		Other	

VEHICLE EXPENSE

Year / Make / Model of Vehicle:					Date First Used for Business:		
Is this Vehicle Leased ?	YES		NO		If so, what is your monthly payment ?	$	
Total # of Miles Driven this year:		# of Business Miles			# of Personal Miles		
Do you have another Vehicle for Personal use ?		**YES**	**NO**	Do you have written evidence to support this deduction ?		**YES**	**NO**

HOME OFFICE DEDUCTION

Please Note that for this expense the area must be used exclusively for this business

Total Square Footage of Home		Monthly Rent Amount	$	Cleaning	$
Square Footage of Space Used		Insurance Homeowners/Renters	$	Storage/Parking	$
Purchase Price of Home	$	Condo/HOA Mgmt Fees	$	Other	$
# of Months Used for Business	#	Utilities	$		$

LIST EQUIPMENT PURCHASED

Description of Equipment	Date Purchased	Date Place in Service	Cost
Computer / Laptop			$
Printer			$
Cell Phone			$
Pager			$
Fax Machine / Scanner			$
Digital Camera			$
Other:			$
			$
			$
			$

NOTES AND OTHER EXPENSES

Have you been considering incorporating your small business ? If so, there are a number of considerations when making this decision. You should consider the business objectives, personal liability risks, employees, etc. In some instances the cost of incorporating will outweigh any possible benefits. Please give us a call with more details on your business and objectives and we can discuss the pros and cons with you.

If you are new client - please provide a copy of last years tax return.