

Real Estate Agent Worksheet

Taxpayer Name: _____ Tax Payer SS#: _____ EIN: _____
 Name of Associated Broker: _____ Date of License: ____ / ____ / ____

Gross Income/Commissions (provide any 1099's) \$		
Advertising		Cell Phone \$
Signage	\$	Internet Access Fees \$
Direct Mail	\$	Self Employed Health Insurance \$
Flyers	\$	Professional Organization Dues & Fees \$
Business Cards	\$	Community Organization Dues & Fees \$
Promotional Items	\$	Errors and Omission Insurance \$
Print Advertising	\$	Bank Charges \$
Classified Advertising	\$	Meals \$
Misc. Advertising	\$	Client / Closing Gifts \$
Legal & Professional Fees	\$	Travel \$
MLS Fees	\$	Client Entertainment \$
Rent – If required at Main Office	\$	Continuing Education Expenses \$
Office Fees	\$	Professional Conference Fees \$
Utilities – Outside of Home	\$	Travel \$
Secretarial/Assistant Expenses	\$	Courier Services \$
Copying Expenses	\$	Keys & Locksmiths \$
Printing Costs	\$	Lock Boxes \$
Office Supplies	\$	Photographs (film & Processing) \$
Business Insurance (not health)	\$	Open House Expenses \$
Dues & Publications	\$	Referral Fees \$
Postage & Shipping	\$	Other – Specify: \$
Telephone – 2 nd line if in home	\$	Date you started your business: / /

Vehicle Expense			
Vehicle expenses (provide breakdown)	\$	If you lease, what is the monthly payment?	\$
Type & Year of Vehicle:		Number of Miles Driven for Business Jan 1–Jun 30	mi.
Date First Used for Business: / /		Number of Miles Driven for Business July 1– Dec 31	mi.
Do you have another car for personal use? Yes or No		Number of Miles Driven for Personal Jan 1– Dec 31	mi.
Do you have evidence to support the deduction? Yes or No		Number of Miles Driven for Commuting Jan 1- Jun 30	mi.
Is this evidence written? Yes or No		Number of Miles Driven for Commuting July 1– Dec 31	mi.

Home Office			
Square Footage of Home	sq./ft	Cost of Utilities Except Water per Month	\$
Square Footage of Space/Room Used	sq./ft	Amount of Rent Paid per Month	\$
Fair Market Value of Home	\$	Insurance – Homeowners/Renters	\$
Number of Months Office was in Home		Other - Specify	\$

Equipment Purchased Prior to this Tax Year	Date Purchased	Placed in Service	Cost
Computer	/ /	/ /	\$
Printer	/ /	/ /	\$
Cell Phone	/ /	/ /	\$
Pager	/ /	/ /	\$
Fax Machine/Scanner	/ /	/ /	\$
Other	/ /	/ /	\$

List Equipment Purchased this Tax Year	Date Purchased	Placed in Service	Cost
	/ /	/ /	\$
	/ /	/ /	\$
	/ /	/ /	\$
	/ /	/ /	\$
	/ /	/ /	\$

Small Business Comments and Other Expenses:

Note: If new client – provide copy of last years tax return!