

## Real Estate Professional Tax Preparation Expense Summary

**Tax Year:** \_\_\_\_\_

### Client Information

**Business Name (if applicable):** \_\_\_\_\_

**Client Name:** \_\_\_\_\_

**Business Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

#### Business Structure:

- Sole Proprietorship
- Single-Member LLC
- Partnership
- S Corporation
- C Corporation

**Employer Identification Number (EIN) (if applicable):** \_\_\_\_\_

#### Primary Income Type:

- 1099 Independent Contractor
- W-2 Employee
- Both W-2 & 1099

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### Income

**Gross Commission Income:** \$ \_\_\_\_\_

**Referral Income:** \$ \_\_\_\_\_

**Other Business Income:** \$ \_\_\_\_\_

Please provide copies of:

- Forms 1099-NEC
- Forms 1099-MISC
- Forms 1099-K (if applicable)

- W-2(s) (if applicable)
  - Commission Statements
  - Brokerage Year-End Statement
  - Other Income Documents
- 

## Marketing & Advertising

Business Cards: \$ \_\_\_\_\_

Signs & Open House Signs: \$ \_\_\_\_\_

Property Flyers & Brochures: \$ \_\_\_\_\_

Direct Mail Campaigns: \$ \_\_\_\_\_

Online Advertising: \$ \_\_\_\_\_

Social Media Advertising: \$ \_\_\_\_\_

Photography & Videography: \$ \_\_\_\_\_

Drone Photography: \$ \_\_\_\_\_

Virtual Tours: \$ \_\_\_\_\_

Website Expenses: \$ \_\_\_\_\_

Graphic Design & Branding: \$ \_\_\_\_\_

Client Newsletters: \$ \_\_\_\_\_

Promotional Items: \$ \_\_\_\_\_

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## Office Expenses

Office Supplies: \$ \_\_\_\_\_

Computer Equipment: \$ \_\_\_\_\_

Printer & Ink: \$ \_\_\_\_\_

Office Furniture: \$ \_\_\_\_\_

Software & CRM Subscriptions: \$ \_\_\_\_\_

Cloud Storage: \$ \_\_\_\_\_

Office Rent: \$ \_\_\_\_\_

Coworking Fees: \$ \_\_\_\_\_

Home Office Expenses: \$ \_\_\_\_\_

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## Real Estate Professional Fees

MLS Dues: \$ \_\_\_\_\_

Association Dues (Local/State/National): \$ \_\_\_\_\_

License Renewal Fees: \$ \_\_\_\_\_

Errors & Omissions (E&O) Insurance: \$ \_\_\_\_\_

Lockbox Fees: \$ \_\_\_\_\_

Continuing Education: \$ \_\_\_\_\_

Professional Certifications: \$ \_\_\_\_\_

Broker Fees: \$ \_\_\_\_\_

Transaction Fees Paid to Brokerage: \$ \_\_\_\_\_

Desk Fees: \$ \_\_\_\_\_

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## Vehicle & Travel Expenses

Business Miles Driven: \_\_\_\_\_ Miles

If using actual expenses:

Gas: \$ \_\_\_\_\_

Oil Changes: \$ \_\_\_\_\_

Repairs & Maintenance: \$ \_\_\_\_\_

Insurance: \$ \_\_\_\_\_

Registration & Tags: \$ \_\_\_\_\_

Lease Payments: \$ \_\_\_\_\_

Parking: \$ \_\_\_\_\_

Tolls: \$ \_\_\_\_\_

Car Washes/Detailing: \$ \_\_\_\_\_

Business Airfare: \$ \_\_\_\_\_

Hotels: \$ \_\_\_\_\_

Rental Cars: \$ \_\_\_\_\_

Business Meals While Traveling: \$ \_\_\_\_\_

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## Client & Business Development

Client Appreciation Gifts: \$ \_\_\_\_\_

Closing Gifts: \$ \_\_\_\_\_

Open House Refreshments: \$ \_\_\_\_\_

Networking Events: \$ \_\_\_\_\_

Business Meals: \$ \_\_\_\_\_

Referral Fees Paid: \$ \_\_\_\_\_

Sponsorships & Community Events: \$ \_\_\_\_\_

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## Communication

Cell Phone (Business Portion): \$ \_\_\_\_\_

Internet (Business Portion): \$ \_\_\_\_\_

Telephone: \$ \_\_\_\_\_

Video Conferencing Services: \$ \_\_\_\_\_

Postage & Shipping: \$ \_\_\_\_\_

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## Financial & Administrative Expenses

Bank Charges: \$ \_\_\_\_\_

Merchant Processing Fees: \$ \_\_\_\_\_

Accounting & Bookkeeping Fees: \$ \_\_\_\_\_

Tax Preparation Fees: \$ \_\_\_\_\_

Legal Fees: \$ \_\_\_\_\_

Business Insurance: \$ \_\_\_\_\_

Business Loan Interest: \$ \_\_\_\_\_

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## Contract Labor

Transaction Coordinator: \$ \_\_\_\_\_

Virtual Assistant: \$ \_\_\_\_\_

Marketing Contractor: \$ \_\_\_\_\_

Photographer: \$ \_\_\_\_\_

Staging Services: \$ \_\_\_\_\_

Cleaning Services: \$ \_\_\_\_\_

Other Independent Contractors: \$ \_\_\_\_\_

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## Assets Purchased During the Year

Please list business assets purchased.

**Description Date Purchased Cost**

Examples:

- Laptop
  - Cell Phone
  - Camera
  - Drone
  - Printer
  - Office Furniture
  - Lockboxes
  - Signs
- 

## Home Office (If Applicable)

Total Home Square Footage: \_\_\_\_\_

Office Square Footage: \_\_\_\_\_

Mortgage Interest or Rent: \$ \_\_\_\_\_

Property Taxes: \$ \_\_\_\_\_

Homeowners/Renters Insurance: \$ \_\_\_\_\_

Utilities: \$ \_\_\_\_\_

Internet: \$ \_\_\_\_\_

Repairs (Entire Home): \$ \_\_\_\_\_

Repairs (Office Only): \$ \_\_\_\_\_

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## Retirement Contributions

SEP IRA: \$ \_\_\_\_\_

Solo 401(k): \$ \_\_\_\_\_

Traditional IRA: \$ \_\_\_\_\_

Roth IRA: \$ \_\_\_\_\_

Health Savings Account (HSA): \$ \_\_\_\_\_

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## Estimated Tax Payments

Federal Estimated Payments: \$ \_\_\_\_\_

State Estimated Payments: \$ \_\_\_\_\_

Dates Paid: \_\_\_\_\_

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## Other Business Expenses

Please list any additional deductible business expenses.

Description	Amount
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	\$ _____
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	\$ _____
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	\$ _____
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	\$ _____
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## Questions

Did you purchase or sell business equipment during the year?

Yes  No

Did you receive any grants or business assistance?

Yes  No

Did you change brokerages during the year?

Yes  No

Did you start or end your business this year?

Yes  No

Did you pay any independent contractors requiring Form 1099 reporting?

Yes  No

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## Additional Notes

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## Client Certification

I certify that the information provided in this expense summary is complete and accurate to the best of my knowledge. I understand that additional documentation may be requested to prepare my tax return.

**Client Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_