

Real Estate Professional Tax Prep Checklist

INCOME RECEIVED:		Lockbox & Keys		Furniture/Equipment:	Cost	Purch. Date
Total 1099 MISC Received		Supra Key		Camera/Camcorder		
Other - Business Income				Computer		
		Meals & Entertainment		File Cabinet		
EXPENSES:		Lunches & Dinners		Furniture		
		Luncheons & Meetings		Software		
Advertising:		Other Entertainment		Other (list)		
Business Cards		Drinks, Snacks				
Flyers & Printing				Automobile Expenses:	Car #1	Car #2
Signs & Riders		Meetings & Seminars		Model of Car		
Internet Website				Date Purchased or		
Other		Office Expenses:		Date Leased		
		Calculator		FMV of Leased Car		
Brokers' Fees		Greeting Cards/Notes				
		Office Supplies		Total Miles Driven		
Client Follow-Up		Photocopies		Beginning Odometer		
		Recorder & Tapes		Ending Odometer		
Commissions Paid		Postage		Business Miles		
		Stationery		*** Commuting Miles		
Communications:		Other		Auto Club (AAA, etc.)		
Answering Service				Gas		
Cell Phone		Other Supplies		Insurance		
Fax Line		Attache Case		Interest on Auto Loan		
Internet Connect Fees		Calculator		Lease Payments		
Long Distance		Maps		Lubes/Oil Changes		
Pager		Small Tools		Repairs		
Pay Phones		Tape Measures		Tires & Batteries		
Telephone (2nd line)		Miscellaneous		Tune-Ups		
				Ad Valorem (tax only)		
Dues & Publications:		Referral Fees		Tag (License & Mail Fee)		
MLS/FMLS Fees				Parking/Tolls		
Newspapers		Repairs & Maintenance		Other (wash, wax, etc.)		
Professional Dues						
Professional Magazines		Secretarial Services		Insurance Premium Increase		
Reference Books				for business use of auto		
		Selling Expenses				
Film & Processing						
		Taxes & Licenses:				
Flowers/Housewarming		Business License				
		Real Estate Board				
Gifts for Clients*						
		Travel:				
Insurance:		Hotel				
Health Insurance		Airfare				
Office/E&O Insurance		Other				
Other						
		Open House Expenses				
Interest						
		Other Expenses (list):				
Legal & Professional						
Attorneys		Home Office				
CPAs		Sq. Footage of Office				
Other		Total Sq. Footage of Home				
		Total Utility Costs of Home				

* Gifts must not exceed \$25 per person per year.

*** Does not apply if home office is claimed.

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**Call or email us today if
we can assist you
or your clients**