

Tax Prep Checklist for Real Estate Brokers and Professionals

Filing your business tax returns can be very complicated and overwhelming. This checklist will let you know what you need and help you get organized. This list will help us do our job. It is a concise, though not exhaustive, outline of some of the documents we will need when we meet with you.

Supplies & Expenses

- Advertising, Signs, Flags & Banners
- On-line Service Costs
- Attorney & Appraisal Fees
- Bank Charges
- Briefcase
- Business Meals (enter 100%)
- Equipment Repair
- FAX Supplies
- Film & Processing
- Finders Fees
- Gifts, Flowers & Greeting Cards
- Insurance – E. & O. & Liability
- Legal & Professional Services
- Lock Boxes, Keys & Locksmith
- Map Book & Map Software
- Multiple Listing Service
- Office Expenses
- Open House Expenses
- Photocopy Expenses
- Postage & Shipping
- Referral Fees
- Rent
- Repairs to Sell Listed Property
- Stationery
- Other: _____

Equipment Purchases

- Answering Machines
- Calculator
- Camera
- Computer Equipment
- Copy Machine
- FAX Machine
- Printer
- Recorder & Pager
- Telephone
- Modems & Computer Peripherals
- Other: _____

Professional Fees & Dues

- Association Dues
- Chamber of Commerce
- License Fees
- Realty Board
- Other: _____

Continuing Education

- Correspondence Course Fees
- Materials, Supplies & Textbooks
- Seminars & Motivational Tapes
- Other: _____

Telephone Expenses

- FAX Transmissions
- Cellular & Paging Services
- Pay Phone & Tolls Calls
- On-line Charges
- Other: _____

Auto Travel (in miles)

- Client Meetings
- Continuing Education
- Escrow & Loan Office Trips
- Out of Town Business Trips
- Showing Property
- Parking Fees (\$)
- Tolls (\$)
- Other: _____

Travel – Out of Town

- Airfare
- Car Rental
- Parking
- Bus, Subway, Train & Taxi
- Lodging (do not combine with meals)
- Meals (do not combine with lodging)
- Porter, Bell Captain
- Laundry
- Bridge & Highway Tolls
- Telephone Calls (including home)
- Other: _____