

Real Estate Agent Tax Deduction Checklist

As a real estate professional, tracking your business expenses throughout the year can lead to significant tax savings. Use this checklist to help identify common deductions and keep your finances organized. From mileage to marketing, every write-off counts—so be proactive and stay prepared for tax season!

VEHICLE & TRAVEL EXPENSES

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|---|---|
| <input type="checkbox"/> Mileage driven for business (track via mileage log or app) | <input type="checkbox"/> Auto loan interest (if vehicle is used for business) |
| <input type="checkbox"/> Parking fees and tolls | <input type="checkbox"/> Car washes (if showing clients) |

HOME OFFICE DEDUCTION

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|---|---|
| <input type="checkbox"/> Portion of rent/mortgage (based on office sq. footage) | <input type="checkbox"/> Home insurance (portion used for business) |
| <input type="checkbox"/> Utilities (electric, internet, water, gas) | <input type="checkbox"/> Office furniture and equipment (desk, chair, lighting) |
| | <input type="checkbox"/> Repairs and maintenance for office area |

TECHNOLOGY & OFFICE SUPPLIES

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|---|--|
| <input type="checkbox"/> Cell phone and service (business portion) | <input type="checkbox"/> Software (CRM, accounting, e-signature tools) |
| <input type="checkbox"/> Computer, printer, monitor | <input type="checkbox"/> Website hosting and domain fees |
| <input type="checkbox"/> Office supplies (paper, pens, folders, etc.) | <input type="checkbox"/> Business apps and subscriptions (Zoom, Canva, etc.) |

MARKETING & ADVERTISING

- | | |
|---|--|
| <input type="checkbox"/> Business cards, flyers, brochures | <input type="checkbox"/> Photography, videography, and staging costs |
| <input type="checkbox"/> Social media ads and digital marketing | <input type="checkbox"/> Promotional items (swag, giveaways) |
| <input type="checkbox"/> Signs and banners | |

EDUCATION & DEVELOPMENT

- | | |
|---|---|
| <input type="checkbox"/> Real estate courses and certifications | <input type="checkbox"/> Coaching and mentorship programs |
| <input type="checkbox"/> Books and industry publications | <input type="checkbox"/> Conferences, webinars, and workshops |

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PROFESSIONAL FEES & DUES

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|---|---|
| <input type="checkbox"/> Real estate license renewal | <input type="checkbox"/> Legal or consulting fees |
| <input type="checkbox"/> MLS fees | <input type="checkbox"/> Tax preparation or accounting services |
| <input type="checkbox"/> Association dues (NAR, state/local boards) | |

CLIENT-RELATED EXPENSES

- | | |
|--|--|
| <input type="checkbox"/> Closing gifts | <input type="checkbox"/> Event or party costs (client appreciation events) |
| <input type="checkbox"/> Client meals (50% deductible) | <input type="checkbox"/> Referral thank-you gifts |

MISCELLANEOUS BUSINESS EXPENSES

- | | |
|---|---|
| <input type="checkbox"/> Insurance (E&O, general liability, etc.) | <input type="checkbox"/> Assistant or virtual assistant costs |
| <input type="checkbox"/> Bank fees on business accounts | <input type="checkbox"/> Transaction coordinator fees |
| <input type="checkbox"/> Business loan or credit card interest | |

BONUS TIPS

- Keep detailed receipts and categorize them monthly.
- Use a business bank account or credit card for easier tracking.
- Use a mileage tracker app for accurate auto deductions.
- Talk to a CPA who understands real estate to maximize your deductions.

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