

# Appleby & Associates

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## REAL ESTATE & SALES PROFESSIONAL DEDUCTIONS

**Income as Reported on 1099**

\$ \_\_\_\_\_

**Advertising**

Flyers/Cards \_\_\_\_\_  
 Printed Ads/ Signs \_\_\_\_\_  
 Radio/ TV \_\_\_\_\_  
 RE Publications \_\_\_\_\_  
 Other \_\_\_\_\_

**Books & Subscriptions**

RE Related Magazine \_\_\_\_\_  
 Sales Books \_\_\_\_\_  
 Thomas Guide/Map Book \_\_\_\_\_  
 Other \_\_\_\_\_

**Communication**

Cell Phone \_\_\_\_\_  
 Internet Service \_\_\_\_\_  
 Office Phone \_\_\_\_\_  
 Other \_\_\_\_\_

**Continuing Education**

Airfare \_\_\_\_\_  
 Hotel/ Motel \_\_\_\_\_  
 Local Transportation \_\_\_\_\_  
 Seminar Fees \_\_\_\_\_  
 # of Overnight Stays \_\_\_\_\_  
 Other \_\_\_\_\_

**Contributions**

Church \_\_\_\_\_  
 Community Groups \_\_\_\_\_  
 Non-Cash Donations \_\_\_\_\_  
 Volunteer Expenses \_\_\_\_\_  
 Volunteer Mileage \_\_\_\_\_  
 Other \_\_\_\_\_

**Expenses (Paid to People)**

Commissions \_\_\_\_\_  
 Contractors \_\_\_\_\_  
 Finders Fees \_\_\_\_\_  
 Home Inspectors \_\_\_\_\_  
 Other \_\_\_\_\_

**Home Expenses**

Lines of Credit \_\_\_\_\_  
 Mortgage \_\_\_\_\_  
 Points \_\_\_\_\_  
 Property Tax \_\_\_\_\_  
 Other \_\_\_\_\_

**Meals & Entertainment**

Client Meals \_\_\_\_\_  
 Entertainment \_\_\_\_\_  
 Other \_\_\_\_\_

**Office Equipment Purchases**

(need Date and Price Paid)  
 Computer \_\_\_\_\_  
 Fax/Printer \_\_\_\_\_

PDA \_\_\_\_\_  
 Printer \_\_\_\_\_  
 Other \_\_\_\_\_

**Office Supplies**

Postage \_\_\_\_\_  
 Supplies \_\_\_\_\_  
 Other \_\_\_\_\_

**Miscellaneous Expenses**

Bank Charges \_\_\_\_\_  
 Buyer Accommodations \_\_\_\_\_  
 (Warranties, Repairs, Etc.)  
 Client Gifts \_\_\_\_\_  
 Errors & Omissions Ins \_\_\_\_\_  
 Interest on Business CC's \_\_\_\_\_  
 Open House Expenses \_\_\_\_\_  
 Other \_\_\_\_\_

**Professional Expenses**

Broker Dues \_\_\_\_\_  
 DRE License \_\_\_\_\_  
 Legal/ Accounting Fees \_\_\_\_\_  
 Local Board \_\_\_\_\_  
 MLS Fees \_\_\_\_\_  
 Regional Board \_\_\_\_\_  
 Other \_\_\_\_\_

**ANNUAL Home Office Expense**

Alarm \_\_\_\_\_  
 Cleaning Service \_\_\_\_\_  
 Electricity \_\_\_\_\_  
 Gas \_\_\_\_\_  
 Insurance \_\_\_\_\_  
 Trash \_\_\_\_\_  
 Water \_\_\_\_\_  
 Improvements (entire house) \_\_\_\_\_  
 Improvements (home office) \_\_\_\_\_  
 Other \_\_\_\_\_

**1<sup>st</sup> YR ONLY Home Office Expense**

Area of office (in sq ft) \_\_\_\_\_  
 OR # of rooms in home \_\_\_\_\_  
 (exclude bathrooms/closets)  
 Price of Home \_\_\_\_\_  
 Value of Land \_\_\_\_\_  
 Other \_\_\_\_\_

**Vehicle Expenses**

	Vehicle 1	Vehicle 2
Make/	_____	_____
Model	_____	_____
Total	_____	_____
Miles	_____	_____

Business Miles \_\_\_\_\_

DMV \_\_\_\_\_

Interest \_\_\_\_\_

Gas\* \_\_\_\_\_

Ins\* \_\_\_\_\_

Pymt\* \_\_\_\_\_

Misc\* \_\_\_\_\_

Repairs\* \_\_\_\_\_

\*Only required for actual expense

**FOR NEW CLIENTS ONLY**

Last Year's State Tax Refund \_\_\_\_\_

Last Year's Tax Prep Fee \_\_\_\_\_

**TIPS FOR TAX SEASON**

1. Please, review "Other Possible Deductions/ Income" list. (This document is designed to help remember all necessary documents.)

2. If you sold stocks, bring the following for *each transaction*:

- Buy date & sale date
- Buy price & sale price

3. If you refinanced, bring all mortgage statements (1098's) from the old and new mortgage companies.