



LEE'S TAX

AND FINANCIAL SOLUTIONS

Realtor Deductions Savings Form

Maximize Your Savings with Smart Deductions! 

Personal Information:

- Name: _____
- License Number: _____
- Contact: _____

1. Mileage Deduction:

- Business-related Mileage:
 - Property showings: _____
 - Client meetings: _____
 - Errands: _____
 - Open house supplies \$ _____
 - Cleaning Contractors \$ _____
 - Contractors \$ _____
 - Repair and maintenance for vehicle business % usage \$ _____

2. Home Office Essentials:

- Deduct a portion of home expenses:
 - Mortgage/Rent: Sq ft of home office _____ DIVIDED BY Sq Ft of home _____ = your home office %. For example $350\text{sqft}/2500\text{sqft}=0.14 \times 100=14\%$
 - Deduct the percentage of the home office \$ _____
 - Same percentage from office Utilities: \$ _____

3. Marketing Mastery:

• Invest in your brand:

- Business cards: \$ _____
- Online ads: \$ _____
- Promotional materials: \$ _____
- Photo Shoots \$ _____
- Videographer \$ _____
- Virtual Assistant \$ _____
- Wardrobe Branded clothes \$ _____
- Website
- Advertising

4. Professional Growth:

• Deduct expenses for:

- License renewals: \$ _____
- Association dues: \$ _____
- Education courses and workshops: \$ _____
- Realtor Fees: \$ _____
- Brokerage Fees: \$ _____
- Insurance fees \$ _____
- Health Insurance \$ _____

5. Travel & Tech:

• Deduct travel expenses responsibly:

- Combined business travel: \$ _____

• Invest in tech tools:

- Smartphones: \$ _____

- Laptops: \$ _____
- Software: \$ _____

6. Education Investments:

- Deduct costs for courses and workshops: \$ _____

7. Gift Savings:

- Strengthen client relationships:
 - Up to \$25 per person: \$ _____

Record-Keeping Tips:

- Maintain a detailed log of mileage, expenses, and receipts.
- Consult with a tax professional (we are accepting new clients) to ensure accurate deductions.

Let's Thrive Together!  *Note: This form is for tracking purposes. Consult a tax professional for personalized advice. We are accepting new clients. Make an appointment for a free consultation or click file virtually to file now.*

[Signature] _____ [Date] _____