



The Real Estate Agent Write-Off Checklist

A simple daily system to track deductions, save receipts, and stop handing money back at tax time.

The 2-minute daily habit

Capture it

Snap or forward every receipt the same day.

Label it

Mark business, personal, or tied to a deal.

Save proof

Add a quick note: who, what, where, why.

Review weekly

Clean up anything missing before you forget.

Receipt proof rule

- What was it for?
- Which client, listing, or business need?
- Was it business-use only or partial?
- Is the receipt saved somewhere safe?

No receipt. No proof. No deduction.

This month at a glance

Receipts saved

Mileage trips

Deal expenses

CPA questions

Common Agent Write-Offs to Track

Use this as a starting point. Check with your CPA for your specific situation, especially if something is mixed business and personal.

Vehicle + travel

- Mileage to showings, closings, inspections
- Parking and tolls
- Car washes and maintenance - business-use
- ^{portion} Travel to conferences or training

Marketing + advertising

- Listing photos and video
- Signs, riders, and lockboxes
- Online ads and boosted posts
- Mailers, flyers, and business cards
- Website, domain, and landing pages

Office + technology

- CRM and transaction tools
- Phone and internet - business-use portion
- Computer, tablet, printer, accessories
- Home office - if you qualify
- Cloud storage and document tools

Professional + licensing

- License renewals
- MLS and association dues
- E&O insurance
- Brokerage desk and transaction fees
- CPA, legal, and professional help

Clients + closings

- Closing gifts - within IRS limits
- Client meals - business-use portion
- Staging and prep costs you covered
- Open house supplies
- Buyer/listing packets and printing

Education

- Continuing education courses
- Coaching and masterminds
- Books, courses, and industry subscriptions
- Conferences, workshops, and events

Turn the Checklist Into a Habit

This page is the simple operating rhythm. It keeps receipts from piling up and helps you stay CPA-ready as you go.

Daily receipt capture

- Snap receipt before you leave
- Forward email receipt
- Add client / deal / reason
- Mark business or personal
- Put paper receipt in one place

Friday 10-minute review

- Clear unsorted charges
- Attach missing receipts
- Log mileage trips
- Tag deal-related expenses
- Write down CPA questions

Weekly tracker

Week	Receipts saved	Mileage logged	Missing proof	Done
Week 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Week 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Week 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Week 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Monthly closeout questions

- Did every business charge have a receipt or note?
- Did I separate business and personal charges?
- Did I save tax money from commission checks?
- Did I export or share what my CPA needs?

Track Write-Offs by One Closing

Print one page for each listing or buyer deal. This is how you keep deal costs from disappearing into one big pile.

Deal details

Property / client: _____

Closing month: _____

Expected commission: _____

Lead source: _____

Notes: _____

Expense log for this deal

Expense	Category	Amount	Receipt?
_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>

Total deal costs

\$ _____

Ready for CPA?

Receipts saved + notes added

Use This Every Friday

A fast monthly log for the little charges agents forget. Add the expense, save the receipt, and clean it up before tax time.

Monthly write-off log

Date	Vendor / place	Category	Deal / client	Amount	Receipt
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>

Friday review reminder

Before the week ends: save receipts, label business purpose, and tag anything tied to a closing.