

## AGENT'S INCOME DATA SHEET

**NOTE:** This form is used by an agent or broker when analyzing the income and expenses they are likely to experience while employed by a broker, to estimate their entry or change-of-office costs and their anticipated annual gross income and expenses resulting from the employment.

DATE: \_\_\_\_\_, 20\_\_\_\_

Brokerage office: \_\_\_\_\_

**ANNUAL INCOME AND EXPENSES:**

<b>1.</b>	Gross Brokerage Fees [See instructions at line 11.4] . . . . .	\$ _____	100 %
1.1	Franchise fee disbursement ( _____% of § 1.) (-) \$ _____		
	a. Subtotal . . . . .	\$ _____	
1.2	Broker retains _____% of <input type="checkbox"/> §1., or <input type="checkbox"/> §1.1a. (-) \$ _____		
<b>2.</b>	<b>Gross Fees due Agent</b> . . . . .	\$ _____	_____ %
<b>3.</b>	<b>Transaction Deductions by Broker:</b>		
3.1	Less:		
	a. E & O premium (\$ _____ per closing) \$ _____		
	b. Prior client promotion ( _____% of fee) . . . . .	\$ _____	
	c. Listing/Transaction coordinator . . . . .	\$ _____	
	d. Other _____ . . . . .	\$ _____	
3.2	Total charges withheld . . . . . (-) \$ _____		_____ %
<b>4.</b>	<b>Office Expenses:</b>		
4.1	Equipment rent . . . . .	\$ _____	
4.2	Forms & manuals. . . . .	\$ _____	
4.3	Desk space and parking charges . . . . .	\$ _____	
4.4	Membership:		
	a. Trade association. . . . .	\$ _____	
	b. MLS fees. . . . .	\$ _____	
	c. Affiliations . . . . .	\$ _____	
4.5	Supplies/software updates . . . . .	\$ _____	
4.6	Postage/delivering services . . . . .	\$ _____	
4.7	Library/subscriptions. . . . .	\$ _____	
4.8	Photocopies. . . . .	\$ _____	
4.9	Equipment use charge . . . . .	\$ _____	
4.10	Total office expenses: . . . . . (-) \$ _____		_____ %
<b>5.</b>	<b>Agent's Business Expenses:</b>		
5.1	Telephone:		
	a. Phone/fax . . . . .	\$ _____	
	b. Cell phone. . . . .	\$ _____	
5.2	Auto:		
	a. Gas/oil. . . . .	\$ _____	
	b. Repairs and maintenance/carwash . . . . .	\$ _____	
	c. Insurance . . . . .	\$ _____	
	d. Loan/lease payment. . . . .	\$ _____	
	e. Registration . . . . .	\$ _____	
5.3	Printing:		
	a. Farm letters . . . . .	\$ _____	
	b. Postage. . . . .	\$ _____	
5.4	Licensing fees and education . . . . .	\$ _____	
5.5	Internet service . . . . .	\$ _____	
5.6	Legal and accounting . . . . .	\$ _____	





5.7 Marketing sessions ..... \$ \_\_\_\_\_

5.8 Travel/hotel ..... \$ \_\_\_\_\_

5.9 Entertainment ..... \$ \_\_\_\_\_

5.10 Insurance (business and health) ..... \$ \_\_\_\_\_

5.11 Total Business Expenses ..... (-) \$ \_\_\_\_\_ %

**6. Marketing and Sales Expenses:**

6.1 Printing flyers/mailer for listings ..... \$ \_\_\_\_\_

6.2 Property ads:

    a. Newspaper/magazine ..... \$ \_\_\_\_\_

    b. TV/radio/web ..... \$ \_\_\_\_\_

6.3 Postage (marketing) ..... \$ \_\_\_\_\_

6.4 Property preparation ..... \$ \_\_\_\_\_

6.5 Open house (food/drinks) ..... \$ \_\_\_\_\_

6.6 Gifts on closing ..... \$ \_\_\_\_\_

6.7 Transactional expenses ..... \$ \_\_\_\_\_

6.8 Total marketing and sales expenses ..... (-) \$ \_\_\_\_\_ %

**7. Agent's Net Income:** ..... \$ \_\_\_\_\_ %

7.1 Income, SS & medicare taxes ..... (-) \$ \_\_\_\_\_ %

**8. Agent's After-Tax Income** ..... \$ \_\_\_\_\_ %

**9. Other Income Sources:**

9.1 Draw/Advance ..... \$ \_\_\_\_\_

9.2 Other \_\_\_\_\_ ..... \$ \_\_\_\_\_

9.3 Other \_\_\_\_\_ ..... \$ \_\_\_\_\_

**10. Cost-of-Entry/Change-of-Office Analysis:**

10.1 Marketing course ..... \$ \_\_\_\_\_

10.2 Lock boxes ..... \$ \_\_\_\_\_

10.3 Open house signs ..... \$ \_\_\_\_\_

10.4 Stationary/cards ..... \$ \_\_\_\_\_

10.5 Computer/programs/printer ..... \$ \_\_\_\_\_

10.6 Office furniture ..... \$ \_\_\_\_\_

10.7 Photocopier ..... \$ \_\_\_\_\_

10.8 Phone/fax equipment ..... \$ \_\_\_\_\_

10.9 Phone installation ..... \$ \_\_\_\_\_

10.10 Camera/printer ..... \$ \_\_\_\_\_

10.11 Vehicle ..... \$ \_\_\_\_\_

10.12 Other \_\_\_\_\_ ..... \$ \_\_\_\_\_

10.13 Other \_\_\_\_\_ ..... \$ \_\_\_\_\_

10.14 Total Entry/Relocation Costs: ..... \$ \_\_\_\_\_

**11. Gross Brokerage Fee Projection/Forecast:**

11.1 Annual after-tax income desired by agent ..... \$ \_\_\_\_\_

11.2 Divide by percentage of after-tax income at §8. .... (÷) \_\_\_\_\_

11.3 Annual Gross Brokerage Fee needed at §1.  
to earn the desired after-tax income at §11.1: ..... (=) \_\_\_\_\_

11.4 Analyze the source of Gross Brokerage Fees at §1 by setting the price of the typical transaction Agent will close, the dollar amount Broker will receive as the Gross Brokerage Fee on the typical transaction, and the number of typical transactions Agent must close within one year to attain the Gross Brokerage Fees set as the goal at §11.3.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_