



# JENSON & JENSON

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Growing Through  
Generations

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# TAX & ACCOUNTING PROFESSIONALS

## **Joshua Jenson, CPA aka JJ the CPA**

Joshua has 32 years of public accounting experience in tax and is a licensed CPA in Oklahoma and Texas, and a member of the American Institute of CPAs and Oklahoma Society of CPAs. Joshua is a 1993 graduate of Abilene Christian University where he earned his accounting degree. JJ the CPA has over 100,000 SUBSCRIBERS and over 8 million views on his YouTube channel “JJ THE CPA,” and has authored 2 books available on Amazon.

## **Cooper Jenson**

Cooper has been working with his father since 2017. He is preparing for CPA certification, inspired by his father's and great grandfather's career path. Although baseball was his initial passion, winning a state championship in 2019, Cooper's focus shifted to taxes full-time in 2022. He specializes in working in the real estate sector with both Realtors and investors.



**WRITE THIS DOWN**

**LLC S-Corp**

**15.3%**

**Receipts**

**Miles**

# REALTOR TAX STRATEGIES

How many days until  
April 15th?

# REALTOR TAX STRATEGIES

Worst tax moves:

FSBO tax preparation

Best tax move:

LLC taxed as S-Corp

# BEST REALTOR TAX STRATEGY

**Set up an entity structure:** Our clients select LLC

- You need to consult an attorney or use Legal Zoom
- Separate you and your assets from your business
- Limit your personal liability
- This is NOT selecting your tax classification

**Select tax classification:** S-Corp

- You must use a tax professional. **DO NOT DO YOURSELF!**
- Must file Form 2553 timely-75 Days **See instructions but use tax pro**
- Fit for clients who are “active” in their business
- NOTE: Partnership best for passive activities

# TAX STRATEGIES: KEEP RECEIPTS

Keep receipts:

\$1 receipt saves approx 42¢ in tax

\$10,000 receipts = \$4,200 less tax

Without a receipt you do NOT get  
the tax deduction = cost you!

Example based on 42% effective tax rate

# TAX STRATEGIES: TRACK MILEAGE

1 mile = 72.5¢ deduction (2026)  
= 30.45¢ Tax Saved

10,000 miles = \$7,250 deduction  
= \$3,045 less tax

Without a mileage log you do NOT get the  
tax deduction = cost you!

Example based on 42% effective tax rate

# TAX RATES FOR REALTORS



SELF-  
EMPLOYED  
(FORM 1099)  
= Sole Proprietor  
= Business  
Owner

# AVERAGE REALTOR COMBINED TAX RATE ON TAXABLE INCOME

## FILING SCHEDULE C

42% in total income taxes for  
average Realtor in Oklahoma

Possibly as high as 57.05% in total  
taxes at maximum tax rates

# SELF-EMPLOYED FILING SCHEDULE C BASED ON THE NET INCOME, THERE IS BOTH INCOME TAX & SELF-EMPLOYMENT TAXES DUE

You will pay three (3) types of taxes on the net income as a realtor filing as a sole proprietor filing Schedule C:

1. **Federal** income taxes (Max 37%) *Average Realtor 22%*
2. **Oklahoma** income taxes Example: (4.75%)
3. **Self-employment** (S/E) taxes (15.3% up to \$168,600)
  - 2.9% net S/E income above \$168,600
  - 3.8% net S/E income above \$250,000 MFJ or \$200,000 single/HH

# NO SELF-EMPLOYED FILING S-CORPORATION BASED ON THE NET INCOME, THERE IS **ONLY** **INCOME TAX**

You will pay three (3) types of taxes on the net income as a realtor filing as a S-Corporation:

1. **Federal** income taxes (Max 37%) *Average Realtor 22%*
2. **Oklahoma** income taxes Example: (4.75%)
- ~~3. **Self-employment** (S/E) taxes (**15.3%** up to \$168,600)~~
  - ~~— 2.9% net S/E income above \$168,600~~
  - ~~— 3.8% net S/E income above \$250,000 MFJ or~~
  - ~~— \$200,000 single/HH~~



**EXAMPLE:**  
**Which result**  
**do you pick?**

# YOU: NEXT TAX SEASON

- How many homes transactions will you have? Sellers or buyers agent
- Home price times your net commission
- Example: You sell 6 homes for the year

# YOU: NEXT TAX SEASON

You sell 6 homes during the calendar year

	Home Price	Example Only Approx Commission
1.	\$208,000	\$6,000
2.	\$456,000	\$13,000
3.	\$315,000	\$9,000
4.	\$523,000	\$15,000
5.	\$783,000	\$23,000
6.	\$672,000	\$20,000

**Total Example Only**

**Appox. Commission \$86,000**

# YOU: NEXT TAX SEASON

Your Form 1099 from your Broker **\$86,000 Income**  
Your Total Federal & Oklahoma Tax **Due April 15th**

## Not S-Corp

\$20,914 No Receipts, No Mileage Log, No Deductions  
\$15,955 \$10,000 Receipts & 10,000 mileage log

## S-Corp

\$11,771 No Receipts, No Mileage Log, No Deductions  
\$8,118 \$10,000 Receipts & 10,000 mileage log

# YOU: NEXT TAX SEASON

Form 1099 \$86,000 Income

Due April 15<sup>th</sup>

What you did you already learn?

Wait & See: Write a check for \$20,914

LLC as S-Corp with receipts & mileage log:

Write a check for \$8,118

Savings: \$12,796

# REALTOR P&L



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## Realtor Income & Expenses for Tax Purposes

<b>Gross Income (Form 1099)</b>	\$
<b>Broker Fees "Deducted" Before Payment to You</b>	\$
The amount on Form 1099 is the amount actually you deposited into your bank account? Some brokers list the amount before their deductions.	Yes / No
Or is the amount on Form 1099 your gross commission and your broker deducted fees before paying you the net amount?	Yes / No
If so, list broker fees deducted from commission for the year	
Did you confirm the above with your broker? If not, please confirm to avoid you overpaying your taxes.	Yes / No

**Expenses (Only Include Any One Expense on One Line) Total for Entire Year**

Only list items you spent with business purpose & intent that you wouldn't have spent except as a Realtor

Advertising Expense
Bank Charges or Fees
Beauty Supplies ( <i>Rarely Allowed, See Notes</i> )
Broker Fees Paid
Cell Phone Charges
Cleaning Expense
Closing Gifts for Clients
Clothing with Logo or Uniform
Coaching Fees
Conference Fees
Continuing Education (CE)
Contractors
Credit Card Fees
Credit Card Interest Paid
Dues
FedEx, UPS, etc.
Financial Adviser Fees
Flowers
Food, Snacks, Drinks, etc. - Business
Gift Certificates & Gift Cards
Gifts for Clients
Hotel, Air BnB, Venmo
HSA Contributions
Independent Contractors
Inspection Fees
Insurance Expense - General
Insurance Expense - Health
Insurance Expense - Dental
Insurance Expense - Vision

<i>List items paid by check, cash or credit card</i>
Online, Facebook, Instagram, School Events, etc.
Look on bank statements
Personal use strictly NOT allowed. This is for photo-shoots, special even
You paid by check, credit card, cash (not included above)
Fees, accessories, etc.
Open house, showings, etc.
Gifts given to clients or vendors at closing
Regular clothing is strictly not allowed. Clothing for promo won't count i
Professional related, Tom Ferry Consulting, Masterminds, etc.
Realtor, professional, marketing, etc.
Fees to attend, in-person, online, etc.
Related to client's properties & realtor activities
Annual fees, etc.
See credit card statements
Realtor Board, associations, business groups, etc.
Shipping items related to realtor & business
Financial advice (not investment fees)
Gifts, clients, celebration, closings, open house, condolences
Events, open houses, appreciation parties, sponsoring
Given to others
Appreciation items, etc.
Realtor & business related travel
Health Savings Account (HSA) amount your deposited, not by employer
Give us the Form 1099's you sent
If you paid on behalf of the client & not reimbursed
Liability, professional, etc. (list auto below)
You paid, not through employer or your spouse/parents
You paid, not through employer or your spouse/parents
You paid, not through employer or your spouse/parents



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Insurance Expense - Long Term Care	You paid, not through employer or your spouse/parents
Interest Expense	Business loans not home/personal (auto below)
Internet Fees	Home, office, mobile wifi
Lawn Care (At Clients Homes)	Not at your home & not reimbursed
Legal Fees	Paid an attorney, legal services, LLC set up fees
Licenses	Realtor Board, etc.
Meals with Clients & Prospects	Coffee, lunches, dinners, breakfast, etc.
Meals Traveling Overnight	Coffee, lunches, dinners, breakfast, etc.
Membership Fees	Business, realtor, civic groups, etc. (gym fees typically excluded)
Office Supplies	Amazon, staples, paper, etc.
Open House Expenses	Flowers, food, supplies, vendors, etc.
Outside Services	Temporary help
Parking Fees	Local, travel, by app, cash, etc.
Party's for Clients & Prospects	Food, drinks, disposable tableware, DJ, fees, rental costs, etc.
Payroll to Employees	Paid by Form W-2 (not paid by 1099)
Payroll Taxes	Tax paid by employer issuing Form W-2
Pedicures/Manicures for Clients ( <i>Rarely Allowed, See Notes</i> )	Personal use strictly not allowed. Client, promotional event.
Postage	Mailing, shipping, etc.
Printing	Business cards, flyers, promo, events, stationary, signs, etc.
Professional Fees	Accounting fees, consulting fees, etc.
Promotional Expenses	Pens, logo items, etsy, etc.
Rent Expense	NOT at your home. This is for an office outside your home.
Repairs & Maintenance	At a client's home, not reimbursed. On your business assets. (Auto below)
Retirement Plan Contributions	IRA, Roth IRA, 401(k), Simple IRA, SEP (NOT thru an employer)
Security Expense	Security fees, app security, client home cameras (NOT at your home)
Sponsorships	Events, golf tournaments, charitable, school events, etc.
Staging Fees & Costs	Rentals, services, etc. (items you don't keep)
Subscriptions	iTunes, Microsoft, Adobe, magazines, etc.
Telephone	Office, 2nd line at home (cell listed above)
Tolls	Turnpike reports
Travel	Uber, Lyft, tips, dry cleaning (see hotel & airfare)
Travel - Airfare	Luggage fees, upgrades, etc.
Other? List Each	If you are unsure, list it and we will discuss

<b>Home Office</b>		
Square footed of area used for your home office	_____	Cannot including living room, kitchen, common areas.
Total square footed of home	_____	We can discuss if actual expenses of home office are needed.
<b>Automobile Expenses</b>		
<i>(If you have more than one vehicle you are using as a Realtor, provide the following per vehicle)</i>		
Total miles driven in 2024	_____	Odometer reading at January 1, 2024 _____
Business miles driven in 2024	_____	Odometer reading at December 31, 2024 _____
Gas	_____	
Auto Insurance	_____	
Repairs	_____	
Tires	_____	
Tags, title, taxes, etc. (list tolls & parking above)	_____	
Oil Changes	_____	
Car Maintenance	_____	
Cash Washes (Car Wash Membership Fees)	_____	
Vehicle Purchased in 2024: Actual Top Line Purchase Cost Downpayment, rebates, discounts, financing, trade, MSRP irrelevant	_____	Make/Model _____ Miles at Purchase _____ <i>Provide Purchase Stmt</i>
Car Payment Information (If none, write NONE)		
<i>If Lease, Monthly Payment</i>	_____	Company you lease from: _____
<i>If Car Loan, Monthly Payment</i>	_____	Bank you have loan at: _____
Interest Paid in 2024 (See your statements, call or look online)	_____	
Car loan balance at 12/31/24	_____	
<b>New Assets Purchased</b>		
Cell Phones	_____	Purchased (list fees above)
Computers, iPads, Mac, etc.	_____	Used as a Realtor
Equipment for Office, Scanner, Copier, etc.	_____	Used as a Realtor
Furniture, Desks, Office Chairs, etc.	_____	Used as a Realtor
Office Décor	_____	Used as a Realtor
Printers, etc.	_____	Used as a Realtor
Staging Assets Purchases (Vase, Décor, Furniture, etc.) Items You Will Used at Multiple Stagings at Clients Homes	_____	Used as a Realtor
Other Business Assets	_____	Used as a Realtor



Schedule C

vs.

S-Corp

# SEEK TAX ADVISOR

We recommend to clients they do not consider becoming an S-corporation until they are routinely netting over \$40,000 in “net” taxable income.

This is due to the cost of the s-corporation vs. The potential tax savings.

# A WORD ON “LLC’S”

LLC’S ARE A LEGAL DESIGNATION

“LLC” IS **NOT** A TAX  
CLASSIFICATION

**YOU MUST REGISTER YOUR LLC  
WITH THE OKLAHOMA REAL  
ESTATE COMMISSION**

# A WORD ON “LLC’S”

You create an LLC at the  
Oklahoma Secretary of State

You can only elect it to be a S-  
corp with the IRS

# A WORD ON “LLC’S”

**YOU MUST REGISTER YOUR LLC WITH THE OKLAHOMA REAL ESTATE COMMISSION BEFORE YOU DO ANYTHING WITH IT. THE FINES WILL BE THOUSANDS AND THOUSANDS AND THOUSANDS OF DOLLARS. COORDINATE THIS WITH BROKER.**

**A REALTOR IN A PREVIOUS CLASS TOLD US THEIR FINE WAS \$28,000 AND THEY COULD NOT GET OUT OF IT! THIS IS NO JOKE!**

# FROM OREC WEBSITE



OKLAHOMA  
Real Estate Commission

## Payment of Commission Entity

A payment of commission entity is a business entity created by a real estate licensee for the sole purpose of receiving earned commissions from their brokerage. Many real estate licensees decide to receive their commissions through an entity instead of their legal name for tax purposes. For additional information, please seek advice from an attorney or CPA.



### Entity may not advertise or receive commissions except from the Broker

The pay entity is prohibited from receiving commissions/income for any other business or brokerage (even if unrelated to real estate). The pay entity shall only be used for the purposes of receiving earned commissions from your Broker.



### Each associate may only register one entity

Each associate may only register one entity for the purpose of receiving commissions from their brokerage.



### Broker approval required

Broker approval must be provided in order for the pay entity to be registered with the Commission. Broker approval is obtained when requesting registration in the [License Portal](#).



### Ownership in the entity is limited to spouses and blood relatives

Only blood relatives and spouses are allowed to have an ownership interest in the entity. Other licensees, team members, business partners, and unlicensed persons are not allowed to have ownership in the entity unless they are blood related or a spouse.



### Licensee requesting registration must be the majority stockholder of the entity

The licensee requesting registration must own more than 50% of the pay entity being registered.



### Register the pay entity with the Commission and with the Secretary of State

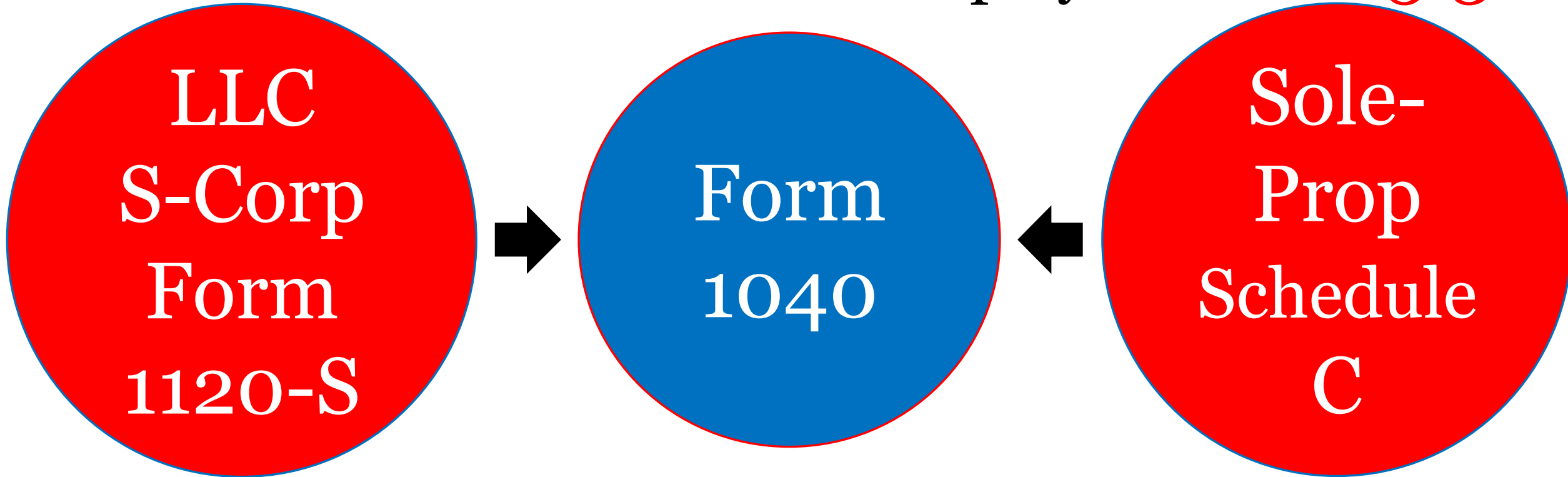
Visit the [Secretary of State website](#) and register the entity and obtain a certificate of Good Standing. Additionally, you will need to login to the your [License Portal](#) and request registration of the entity with the Commission.



### Entity cannot perform licensable activity

The business entity is prohibited from performing any act requiring a real estate license (i.e. advertising or soliciting using the business entity name, selling, buying, etc.) and must not hold itself out to appear to be a real estate company or business.

All net income subject to  
self-employment tax **15.3%**



Self-employment tax **0%**  
Wages subject to 15.3%  
**but you decide that amount**

# **S-CORP REQUIRES WAGES TO BE PAID TO THE REALTOR FOR SERVICES TO THE S-CORP**

Wages are subject to payroll taxes which is the same rate as self-employment taxes, but on a lower amount that can be controlled and predictable vs. self-employment taxes.

Payroll taxes for owner who is both employee & employer:

$$\begin{aligned} & \text{Employee withholdings } 7.65\% \\ + & \text{ Employer match } 7.65\% \\ = & \text{ Total tax } 15.3\% \end{aligned}$$



# FIRST STEPS



# FIRST STEPS TO TAKE

1. Set up an entity structure (LLC)
2. REGISTER YOUR LLC WITH OKLAHOMA REAL ESTATE COMMISSION
3. Obtain EIN from IRS (Careful) (Seek tax professional)
4. Set up bank account for business
5. Sign up for Quickbooks online & connect to bank. Track receipts & mileage.
6. Start payroll to yourself.
7. **Go make money!**  
Deposit all business income and pay all business expenses

# **KICK into GEAR**



# SEPARATE BANK ACCOUNT

**Businesses have a business bank account, separate from the personal account of any owner.**

Business bank account for

- All income to be deposited
- All expenses to be paid
- Pay credit card for amounts charged for business
- Separates out for audit
- **NOT FOR PERSONAL EXPENSES (Creates income)**

# SEPARATE CREDIT CARD

**Businesses have a separate credit card, separate from the personal credit card of any owner.**

Credit card used for

- Business expenses
- Charge business expenses
- Pay the credit card from the business account
- Separates out for audit
- **NOT FOR PERSONAL EXPENSES (Creates income)**

# CREDIT CARDS

**A separate credit card is best to separate business charges from personal charges**

It does not need to be in the “business name.”

- What counts is that the credit charges are for business
- The business bank account only pays for the business charges
- If you have personal credit charges:
  - Pay the personal charges from personal account
  - Pay the business charges from business account

# TRACKING INCOME & EXPENSES

**We require our clients use QuickBooks online!  
THE “SIMPLE START” PLAN**

We get access to assist, clean up, prepare reports

- Ensure you capture all your income & expenses
- Can upload pictures of your receipts
- Can track your mileage
- Keep you audit ready!



Simple Start



QuickBooks  
Online

# TRACKING MILEAGE

**Get an app on your phone!**



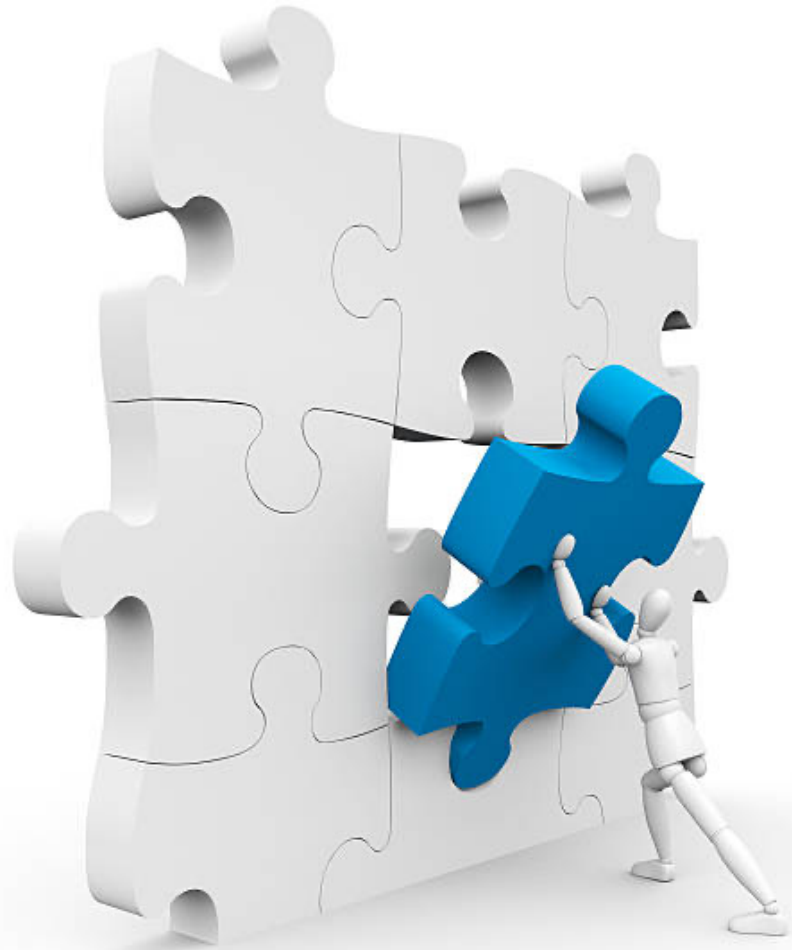
**IMMEDIATELY START PAYROLL**

**Pay yourself a wage from your LLC as S-Corp  
SEEK TAX PROFESSIONAL**

**Payroll**



# PAYING YOUR TAXES!



**QUARTERLY  
ESTIMATED  
TAX  
PAYMENTS**

# WHEN SHOULD YOU “PAY IN” YOUR TAXES?

**QUARTERLY!**

The IRS & OTC require your taxes **be paid**  
**“evenly”** through out the year. If not, you  
incur *underpayment penalties*,  
Waiting until April 15<sup>th</sup> is only “penalty-  
free” only on the amount you owe above the  
required *safe-harbor* tax payments.

# ESTIMATED TAX PAYMENTS FEDERAL & OKLAHOMA DUE DATES

April 15<sup>th</sup>

1<sup>st</sup> Quarter

June 15<sup>th</sup>

2<sup>nd</sup> Quarter

September 15<sup>th</sup>

3<sup>rd</sup> Quarter

January 15<sup>th</sup>

4<sup>th</sup> Quarter



# ESTIMATED TAX PAYMENTS: MAKING PAYMENTS

These payments can be made online, over the phone, or mailed in.

Federal: **Form 1040-ES**

Oklahoma: **Form OW-8-ES**

**JJ THE CPA**®

**Real Estate School & CE**



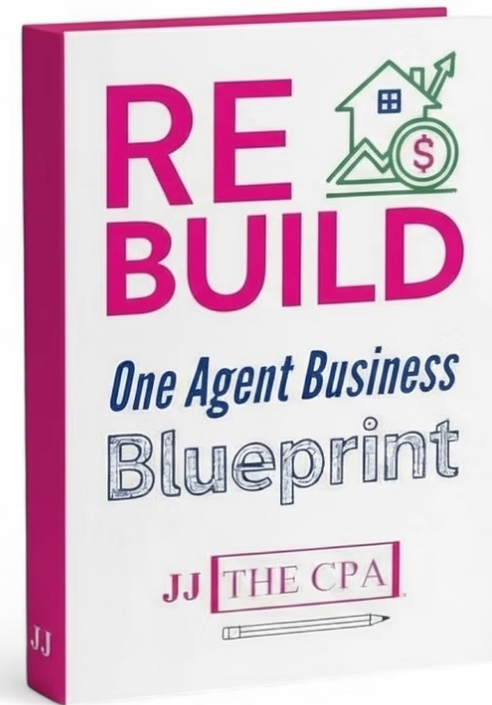
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CHECK  
OUT OUR  
CHANNEL



With over 33 years of experience advising real estate professionals, I know exactly where agents leave money on the table — and how to help them keep more of what they earn. Whether you're in your second year or your twentieth, this book will show you: how to structure your business to save thousands in taxes; what every REALTOR® must track (and keep) to stay audit-proof; why building wealth starts with clarity — not commission; and the 10 essential steps to run a real business, not just buy and sell homes.

How to reclaim your calendar, confidence, and bottom line. This is more than a tax strategy book; it's a mindset shift. It's your permission slip to build a life and business you love—without burnout. I wrote this book for the agents closest to me: my wife, daughter, sister, and the hundreds of REALTORS® I've served for decades. This is personal, proven, and your blueprint. This isn't a tax manual or just a business strategy; it's my playbook, built from real experience, for real people I care deeply about. So, when you hold this book in your hands, know this: you're not alone. You are seen, and you deserve to run your business like the boss you truly are. I didn't become a CPA to crunch numbers; I became a CPA to change the game for entrepreneurs who were never taught how to run a genuine business. And let's be honest—real estate agents have been some of the most overlooked professionals in that conversation for far too long. I've seen too many agents get left behind by bad advice, zero planning, and a complete lack of financial clarity from those they seek tax and financial advice from. I am here to change that. The One-Agent Business™ Blueprint is more than a concept—it's a blueprint for the Realtor ready to run their business like a CEO, stop chasing commissions, and start building real wealth. If you're reading this, you've already taken the first step. And I will be here—through every chapter—to show you exactly how to take your career to the next level.

Learn More

[www.jensonandjenson.com](http://www.jensonandjenson.com)





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# THANK YOU!



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