Were you required to file 1099s for any properties? Yes No

**Rental Property Tax Organizer** Which Properties (if you own multiple properties\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Rental Income and Expenses**

Indicate type of property as 1 - Single Family Residence, 2 - Multi-Family Residence, 3 - Vacation/Short-Term Rental, 4 - Commercial, 5 - Land, 6 - Self-Rental, or 7 - Other (describe).

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | *Property A* | | *Property B* | | *Property C* | |
|  | Location of property: | | Location of property: | | Location of property: | |
|  |  | |  | |  | |
|  |  | |  | |  | |
|  | Type | | Type | | Type | |
|  | Any personal use? Yes No | | Any personal use? Yes No | | Any personal use? Yes No | |
|  | *Fair Rental Days* | *Personal Use Days* | *Fair Rental Days* | *Personal Use Days* | *Fair Rental Days* | *Personal Use Days* |
|  |  |  |  |  |  |  |
| Date placed in service |  | |  | |  | |
| Rents received | $ | | $ | | $ | |
| **Expenses** |  | |  | |  | |
| Advertising | $ | | $ | | $ | |
| Auto and travel | $ | | $ | | $ | |
| Cleaning and maintenance | $ | | $ | | $ | |
| Commissions | $ | | $ | | $ | |
| Insurance | $ | | $ | | $ | |
| Legal and professional fees | $ | | $ | | $ | |
| Management fees | $ | | $ | | $ | |
| Mortgage interest paid to banks | $ | | $ | | $ | |
| Other interest | $ | | $ | | $ | |
| Repairs | $ | | $ | | $ | |
| Supplies | $ | | $ | | $ | |
| Taxes | $ | | $ | | $ | |
| Utilities | $ | | $ | | $ | |
| Other (list) | $ | | $ | | $ | |
|  | $ | | $ | | $ | |
|  | $ | | $ | | $ | |
|  | $ | | $ | | $ | |
|  | $ | | $ | | $ | |
|  |  | |  | |  | |
| **Property Information** | | | | | | |

If this is your first year with our firm, please provide a depreciation schedule for all property placed in service before starting with us.

**Property Purchased.** Treat the cost of improvements made to real property as the purchase of a new asset.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| *Asset* | *Date purchased* |  | *Cost* | *Date placed in service* |
|  |  | $ |  |  |
|  |  | $ |  |  |
|  |  | $ |  |  |
|  |  | $ |  |  |
|  |  | $ |  |  |

**Property Sold or Taken Out of Service**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| *Asset* | *Date sold or taken out of service* |  | *Selling price* | *Trade in?* |
|  |  | $ |  |  |
|  |  | $ |  |  |
|  |  | $ |  |  |
|  |  | $ |  |  |
|  |  | $ |  |  |