

Rental Income/Expenses – Individuals, Estates, & Single Member LLCs

YOU MUST FILL OUT A SEPARATE FORM FOR EACH RENTAL PROPERTY

Note: If this is the first year, we need either the closing statement or settlement statement when you purchased the property or exactly what you paid for it and we will need the city/county assessment for the year of purchase.

Client Name: _____ **Tax Year** _____

Property Type: (Single Family, Duplex, Commercial, Land, Etc.): _____

Property Address: _____

1. **Number of personal use days:** _____
2. **Number of days available for rent:** _____
(If First Year Rented) – What was the date available for rent: _____
3. **Was unit/home rented to a related individual?** _____
4. **Hours spent working/maintaining property:** _____

Income

Rent (Includes late fees charged. Only include security deposit if not returned): _____

Expenses (Purchased or Paid in Tax Year)

Appliances: See Next Page

Accounting Expenses (Not personal tax return): _____

Advertising Expenses: _____

Cleaning & Maintenance Expense/Supplies: _____

Conferences & Seminars (Must be directly related to rental investments) _____

Equipment (List type, amount, & date): See Next Page

Home Improvements & Appliances: See Next Page

Home Remodel: See Next Page

Hotel (Only if property is out of town): _____

Interest Expense (Mortgage) (Please provide Form 1098): _____

Insurance (Property): _____

Legal Expense: _____

Management Fees: _____

Office Supplies: _____

Pest Control: _____

Postage and Shipping: _____

Repairs (Not new items): _____

Taxes – Real Estate (If not showing on Form 1098): _____

Utilities: _____

Yard Exp. (Paying someone else to cut grass & things like that): _____

Other Expenses (List): _____

Auto Miles (Make: _____, Model: _____, & Year: _____)

Total Miles Driven this year (Personal & Business): _____

Business Miles Driven this year (For just this rental property): _____

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Appliances & Equipment: (Must list each appliance with date, amount, and what it is)

1. _____
2. _____
3. _____
4. _____
5. _____

Home Improvements (Must list each improvement with date, amount, and description, but total it by improvement):

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Home Remodel (Use the last date of expenses):

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____