

CLIENT INFORMATION SHEET

RENTAL INCOME / EXPENSES

Customer Name: _____

Is property co-owned? Y / N Other owner(s) name _____

Address of Property: _____

Number of Units: _____ Total Rent Collected: _____

Is there any personal use of property by owner? Y / N If so, percentage: _____

Expenses Related to Property

	Total \$ for Year:
Advertising	_____
Property Insurance	_____
Mortgage Interest Only (from lender stmt)	_____
Office Expenses	_____
Legal, accounting, and other professional fees	_____
Management and administration fees	_____
Maintenance and Repairs	_____
Major Additions or Renovations (specify: _____)	_____
Property Taxes	_____
Utilities (if paid by landlord)	_____

Note RE: Travel / Mileage - Travel costs are only applicable if there are two or more separate addresses in the same area that the landlord needs to travel to in order to reasonably collect rent and/or carry out maintenance. *Ask if unsure.

Additional Notes for Tax Preparer:

