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TAX ORGANIZER FOR REAL ESTATE / CHECKLIST POUR L'IMMOBILIER (2023)

Name of owner (s) / <i>Nom du/des propriétaire (s)</i>			
Type of Rental / <i>catégorie de location (CIRCLE)</i>	Single Family / Multi-family / Vacation / Commercial / Land		
Tenancy terms / <i>durée du bail</i>	=		
Address of rental property / <i>adressee</i>	=		
Rental dates / <i>dates de location</i>	=	Personal Use days / <i>Utilisation personnelle</i>	=
Date of Purchase / <i>date d'achat du bien</i>	=	Date of sale / <i>date de vente de bien</i>	=

Management / <i>Gestion</i>	
NON -rental services to occupants / <i>Services NON-locatifs aux locataires (conciergerie etc)</i>	YES / NO
Owner's hours in managing / <i>Temps de gestion du propriétaire > 750 hours per year</i>	YES / NO
Manager + owner + contractors hours in managing / <i>Temps de gestion du manager + travailleurs > 250 hours per year</i>	YES / NO
Managed as independent enterprise (non-US rental) / <i>gérée en activité professionnelle (location extérieure USA)</i>	YES / NO / N.A

Rental income / <i>Revenus locatifs</i>	\$ =	Travel / <i>Voyages</i>	\$ =
HOA fees / <i>Frais de copropriété</i>	\$ =	Cleaning / <i>Nettoyage</i>	\$ =
Management fees / <i>Frais de gestion</i>	\$ =	Utilities / <i>Electricité & eau</i>	\$ =
Repairs / <i>Entretien, réparation</i>	\$ =	Pest control / <i>Extermination</i>	\$ =
Insurance / <i>Assurance</i>	\$ =	Property tax / <i>Impôt foncier</i>	\$ =
Energy efficient (<i>solar, electric, etc</i>)	\$ =	Other / <i>Autres</i>	\$ =
Professional fees / <i>Avocat, fiscaliste</i>	\$ =		

Other Info / <i>Autres Infos</i>	
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To the best of my knowledge, the information in this tax organizer is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Name, Signature, Date



KARINE BAUER, EA, JD
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updated 01/04/24