

Rental Property Tax Organizer

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).

| | <i>Property A</i> | | <i>Property B</i> | | <i>Property C</i> | |
|---------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | Address of property: | | Address of property: | | Address of property: | |
| | | | | | | |
| | Type | | Type | | Type | |
| | Any personal use? Yes No | | Any personal use? Yes No | | Any personal use? Yes No | |
| | <i>Fair Rental Days</i> | <i>Personal Use Days</i> | <i>Fair Rental Days</i> | <i>Personal Use Days</i> | <i>Fair Rental Days</i> | <i>Personal Use Days</i> |
| | | | | | | |
| 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 2023.

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

| <i>Asset</i> | <i>Date purchased</i> | <i>Cost</i> | <i>Date placed in service</i> |
|--------------|-----------------------|-------------|-------------------------------|
| | | \$ | |
| | | \$ | |
| | | \$ | |
| | | \$ | |
| | | \$ | |

Property Sold or Taken Out of Service

| <i>Asset</i> | <i>Date sold or taken out of service</i> | <i>Selling price</i> | <i>Trade in?</i> |
|--------------|--|----------------------|------------------|
| | | \$ | |
| | | \$ | |
| | | \$ | |
| | | \$ | |
| | | \$ | |