

RENTAL CHECKLIST | DW AGOSTO TAX PLANNING, LLC

**This form is for Sole Proprietors or Single-Member LLCs. Please complete a separate form for each property.
The purpose of this form is to compile your data and necessary documentation. Please complete to reduce billable time.**

TAXPAYER NAME: _____ EIN (if not SS) _____

BUSINESS NAME: _____

RENTAL ADDRESS _____

WHEN DID YOU START RENTING THE PROPERTY? _____

ARE YOU UP-TO-DATE ON YOUR PROPERTY TAXES? _____

HOW MANY DAYS DID YOU USE THE PROPERTY FOR PERSONAL REASONS THIS YEAR? _____

HOW MANY DAYS WAS THE PROPERTY AVAILABLE FOR RENT, EVEN IF IT WAS UNOCCUPI _____

EARNED INCOME _____

INTEREST INCOME _____

DEPOSITS _____

EXPENSES:

ADVERTISING _____

BANK FEES _____

1099 LABOR _____

INSURANCE _____

MORTG INTEREST _____

OTHER INTEREST _____

LEGAL _____

ACCOUNTING _____

OFFICE SUPPLIES _____

EQUIP RENT _____

REPAIRS _____

MAINTENANCE _____

SUPPLIES _____

PROPERTY TAXES _____

PHONE/INTERNET _____

UTILITIES _____

OTHER: _____

HOME OFFICE?

TOTAL SQ FT OF HOME _____

SQ FT OF WORK SPACE _____

VEHICLE MILEAGE?

VEHICLE 1 TYPE _____

TOTAL MILES DRIVEN _____

BUSINESS MILES DRIVEN _____

VEHICLE 2 TYPE _____

TOTAL MILES DRIVEN _____

BUSINESS MILES DRIVEN _____

ASSETS OR CAPITAL IMPROVEMENTS:

If you bought an asset for the property or invested in a capital improvement, please provide a list of all assets including cost and purchase date.