

2024 Tax Organizer for Partnerships Business Information

Partnership Information

Partnership's legal name			EIN	
Doing business as name				
In care of name				
Street address, city, state, and ZIP				
Email				
Phone number		Cell number		
Fax number		Date business started		

Yes No

☐ ☐ Does the partnership file under a calendar year?
If "No," what is the begin date? _____ End date? _____

☐ ☐ Did the partnership conduct business activities in any state other than the resident state?
If "Yes," what states? _____

☐ ☐ Is this the partnership's final year in business?
What accounting method does the partnership use?
☐ Cash ☐ Accrual ☐ Other (describe) _____

What is the partnership's principal business activity? _____

What product or service does the partnership produce? _____

Number of partners at any given time during the year? _____

What type of entity is the partnership filing as?
☐ Domestic general partnership ☐ Domestic limited partnership
☐ Domestic LLC ☐ Domestic limited liability partnership
☐ Foreign partnership ☐ Other (describe) _____

Partnership Representative or Designated Individual (if the representative is an entity)

Representative name			
Street address, city, state, and ZIP			
Phone number		Email	

Estimates

	Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2023	_____	_____	_____	_____
First quarter	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____

Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use This Account for	
			Checking	Savings	Deposit	Withdrawal

2024

Partner Information

Partnership Name: _____

EIN:

[illegible]

Change In Ownership Information

Partnership Name:

EIN:

[illegible]

Partner's Capital Account Information

Partnership Name:

EIN:

[illegible]

Rental Real Estate

Partnership Name:

EIN:

General Property Information

Select the property type

☐ Single family residence

☐ Land

☐ Multi-family residence

☐ Royalties

☐ Vacation

☐ Self-rental

☐ Commercial

☐ Other

Description of property if the property type is "Other"

Address of property

City State ZIP

Foreign province Country Postal code

Number of days property was rented Number of days property was used for personal use

☐ This property was placed in service during tax year 2024.

☐ This property was disposed of during tax year 2024.

Income and Expenses

2024

Gross rental or royalty income

Advertising

Auto and travel

Cleaning and maintenance

Commissions

Insurance

Legal and other professional fees

Interest

Repairs

Taxes

Utilities

Wages and salaries

Guaranteed payments for services

Guaranteed payments for capital

Health insurance payments

Meals and entertainment

Other expenses (list)

Drake Software - Partnership Organizer - Copyright 2024

PNRENT.LD

Rental Other Than Real Estate

Partnership Name:

EIN:

General Property Information

Description of property

Address of property

City State ZIP

☐ This property was placed in service during tax year 2024.

☐ This property was disposed of during tax year 2024.

Income and Expenses

2024

Gross rental income

Advertising

Auto and travel

Cleaning and maintenance

Commissions

Insurance

Legal and other professional fees

Interest

Repairs

Taxes

Utilities

Wages and salaries

Guaranteed payments for services

Guaranteed payments for capital

Other expenses (list)

Auto Expense

Partnership Name:

EIN:

Auto Expense

Name of activity vehicle is used for

Description of vehicle

Date vehicle was placed in service

Yes

No

Was this vehicle available for personal use during off-duty hours?

Was the vehicle used primarily by someone with more than 5% ownership or a related person?

Was another vehicle available for personal use?

Miles the vehicle was driven during 2024

2024 Amount

Business

Commuting

Other

Miles the vehicle was driven in prior years

2024 Amount

Business

Total

Expenses

2024 Amount

Garage rent

Gas

Insurance

Licenses

Oil

Parking fees

Rental fees

Interest

Property tax

Repairs

Tires

Tolls

Lease addback

Other expenses

2024

Asset Listing for 2024

Partnership Name:

EIN:

Assets for:

[illegible]

2024

Income or Loss from Investments in Fiduciaries and Partnerships

Partnership Name:

EIN:

Schedule K-1 from Fiduciaries and Partnerships

Provide all copies of Schedule K-1 and attachments

[illegible]

Sale of Stock, Real Estate, or Other Property

Partnership Name:

EIN:

Sale of Capital Assets (including assets not reported on Form 1099-B)

Provide all brokerage statements

[illegible]

Installment Sale Income

Description of property _____

Date acquired	Date sold	2024	Prior Years
---------------	-----------	------	-------------

Selling price _____

Mortgages assumed	
-----------------------------	--

Cost of property sold

Depreciation allowed

Commissions and expense of sale		
---------------------------------	-------	--

Gross profit percentage

Interest received

Principal payments received

Property was sold to a related party ☐