

# 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).

|                        | Property A                    |                   | Property B                    |                   | Property C                    |                   |
|------------------------|-------------------------------|-------------------|-------------------------------|-------------------|-------------------------------|-------------------|
|                        | Address of property:          |                   | Address of property:          |                   | Address of property:          |                   |
|                        |                               |                   |                               |                   |                               |                   |
|                        |                               |                   |                               |                   |                               |                   |
|                        | Type <input type="checkbox"/> |                   | Type <input type="checkbox"/> |                   | Type <input type="checkbox"/> |                   |
|                        | Any personal use? Yes No      |                   | Any personal use? Yes No      |                   | Any personal use? Yes No      |                   |
|                        | Fair Rental Days              | Personal Use Days | Fair Rental Days              | Personal Use Days | Fair Rental Days              | Personal Use Days |
|                        |                               |                   |                               |                   |                               |                   |
| Date placed in service |                               |                   |                               |                   |                               |                   |
| Rents received         | \$                            |                   | \$                            |                   | \$                            |                   |

**Security deposits.** A security deposit is not included in rental income if you plan to return it to the tenant at the end of the lease. If any amount is forfeited by the renter during the year, include that amount as rental income.

| 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.

| Asset | Date purchased | Cost | Date placed in service |
|-------|----------------|------|------------------------|
|       |                | \$   |                        |
|       |                | \$   |                        |
|       |                | \$   |                        |
|       |                | \$   |                        |
|       |                | \$   |                        |

## Property Sold or Taken Out of Service

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