

Any client who owns rental properties needs to complete this, also include copies for each property of:

1. The most recent rental agreement, if you do not have one, we might be able to use your tax return
2. The Dec page from your home owners insurance company for each property
3. Your most recent mortgage statement for each property

1. Property Address: _____
Type of Property: _____ Acquired on Year _____ Mos _____ Original Purchase Price \$ _____
Apprx Value: \$ _____ Total owed \$ _____ 1st Mtg \$ _____ 2nd Mtg \$ _____
Mrtg Co Name _____ Monthly Payment: \$ _____ HOA: \$ _____
Annual Taxes \$ _____ incl pmt ____ Y ____ N Annual Insurance \$ _____ incl pmt ____ Y ____ N
Current Rent \$ _____ How long rented? _____ Rental income claimed on taxes ____ Y ____ N

2. Property Address: _____
Type of Property: _____ Acquired on Year _____ Mos _____ Original Purchase Price \$ _____
Apprx Value: \$ _____ Total owed \$ _____ 1st Mtg \$ _____ 2nd Mtg \$ _____
Mrtg Co Name _____ Monthly Payment: \$ _____ HOA: \$ _____
Annual Taxes \$ _____ incl pmt ____ Y ____ N Annual Insurance \$ _____ incl pmt ____ Y ____ N
Current Rent \$ _____ How long rented? _____ Rental income claimed on taxes ____ Y ____ N

3. Property Address: _____
Type of Property: _____ Acquired on Year _____ Mos _____ Original Purchase Price \$ _____
Apprx Value: \$ _____ Total owed \$ _____ 1st Mtg \$ _____ 2nd Mtg \$ _____
Mrtg Co Name _____ Monthly Payment: \$ _____ HOA: \$ _____
Annual Taxes \$ _____ incl pmt ____ Y ____ N Annual Insurance \$ _____ incl pmt ____ Y ____ N
Current Rent \$ _____ How long rented? _____ Rental income claimed on taxes ____ Y ____ N

4. Property Address: _____
Type of Property: _____ Acquired on Year _____ Mos _____ Original Purchase Price \$ _____
Apprx Value: \$ _____ Total owed \$ _____ 1st Mtg \$ _____ 2nd Mtg \$ _____
Mrtg Co Name _____ Monthly Payment: \$ _____ HOA: \$ _____
Annual Taxes \$ _____ incl pmt ____ Y ____ N Annual Insurance \$ _____ incl pmt ____ Y ____ N
Current Rent \$ _____ How long rented? _____ Rental income claimed on taxes ____ Y ____ N

5. Property Address: _____
Type of Property: _____ Acquired on Year _____ Mos _____ Original Purchase Price \$ _____
Apprx Value: \$ _____ Total owed \$ _____ 1st Mtg \$ _____ 2nd Mtg \$ _____
Mrtg Co Name _____ Monthly Payment: \$ _____ HOA: \$ _____
Annual Taxes \$ _____ incl pmt ____ Y ____ N Annual Insurance \$ _____ incl pmt ____ Y ____ N
Current Rent \$ _____ How long rented? _____ Rental income claimed on taxes ____ Y ____ N

6. Property Address: _____
Type of Property: _____ Acquired on Year _____ Mos _____ Original Purchase Price \$ _____
Apprx Value: \$ _____ Total owed \$ _____ 1st Mtg \$ _____ 2nd Mtg \$ _____
Mrtg Co Name _____ Monthly Payment: \$ _____ HOA: \$ _____
Annual Taxes \$ _____ incl pmt ____ Y ____ N Annual Insurance \$ _____ incl pmt ____ Y ____ N
Current Rent \$ _____ How long rented? _____ Rental income claimed on taxes ____ Y ____ N