

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). If you use a property management company, provide 1099-MISC, Schedule E, and other supporting income and expense documentation.

	<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	Any personal use?	Yes	Any personal use?	Yes
	<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	\$		\$		\$	
HOA/Condo fees	\$		\$		\$	
Other (provide list)	\$		\$		\$	

Property Information

If this is your first year with our firm, please provide a depreciation schedule for all property placed in service before 2025.

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

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

Property Sold or Taken Out of Service

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