



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.

	Property A			Property B			Property C		
	Address of property:			Address of property:			Address of property:		
	Type			Type			Type		
	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	\$			\$			\$		
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	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?
		\$	
		\$	
		\$	
		\$	
		\$	