

Rental Property Tax Information

Please use a separate sheet for each rental property. Please list only expenses that relate to the property listed. Do not include any personal expenses. Discuss with me any questions you have when filling out this form.

Address of rental property: _____

Do you use this property for personal use? _____ If so, how much of the time?

Income from rental property _____

Expenses

Advertising _____

Miles driven for rental January 1-Dec 31 _____

Parking and tolls for rental _____

Commissions _____

Insurance _____

Legal and other professional fees _____

Management fees _____

Mortgage interest paid to banks _____

Other interest _____

Repairs _____

Supplies _____

Taxes _____

Utilities (paid by you, not by the tenant) _____

Other expense (please specify) _____

Capital assets purchased for rental property (such as refrigerator, furnace, air conditioner)

	Asset 1	Asset 2	Asset 3
Name of asset	_____	_____	_____
Date purchased	_____	_____	_____
Amount paid for asset (including tax)	_____	_____	_____

If this is a new property, I will need information regarding the basis of the property, such as a closing statement. If you are a new client, I will need to see prior year tax returns to calculate basis carryover from prior years. Please contact me about what information is needed.

Please contact me if you have any questions filling out this form.