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Rental Property Tax Organizer

Please Bring Mortgage Interest Statement Form 1098's

Did you make any payments that would require you to file Form(s) 1099?			Yes	No
If Yes, did you or will you file all required Form(s) 1099 & 1096?			Yes	No
Income	Property A	Property B	Property C	
Property Type:				
Property Address:				
Days Rented at Fair Rental Value				
Days of Personal Use				
Ownership Percentage		%	%	
Date Placed in Service				
Rents Received Form 1099-Misc	\$	\$		
Rents Received	\$	\$		

Expenses	Property A	Property B	Property C	
Advertising				
Auto (See Mileage Below)				
Travel				
Cleaning and Maintenance				
Gardening Service				
Commissions				
Mortgage Insurance				
Mortgage Interest From 1098's				
Insurance – (Hazard, Disaster)				
Legal and Professional Fees				
Management Fees				
Repairs				
Supplies				
Real Estate Taxes				
Other Taxes				
Electricity				
Gas				
Water/Sewer				
Trash				
Other Utilities				
Locksmith/Security				
Pest Control				
Home Owners Association Fees				
Eviction Service				
Other:				

Mileage:	Vehicle #1:	Vehicle #2:
Date Vehicle Placed in Service:		
Vehicle Year, Make and Model:		
Odometer Reading on January 1 st :		
Odometer Reading on December 31 st :		
TOTAL mileage driven during the year:		
Business Mileage (do not include commuting)		
Business parking fees & tolls (exclude personal)	\$	\$
Was another vehicle available for personal use?	Yes No	Yes No
Do you have evidence to support your deduction?	Yes No	Yes No
Is the evidence you have written evidence?	Yes No	Yes No

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

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:
		\$	\$
		\$	\$
		\$	\$
		\$	\$