Rental Property Tax Organizer

Rental Income and Expenses | For Tax Year_____

Indicate type of rental as "residential" or "nonresidential." Provide copies of original purchase documents if not previously provided to our firm.

	Property A	*Property B*	*Property C*
Residential or Nonresidential	Residential or Nonresidential	Residential or Nonresidential	Residential or Nonresidential
Full Address			
Days available to rent for the year (do not include personal use days)	Days available _____	Days available _____	Days available _____
	Any personal use? ☐Yes ☐No	Any personal use? ☐Yes ☐No	Any personal use? ☐Yes ☐No
Date placed in service			
Rents received (totals for the year)	$	$	$
Expenses (totals for the year)			
Advertising	$	$	$
Cleaning and maintenance	$	$	$
Commissions	$	$	$
Insurance	$	$	$
Legal and professional fees	$	$	$
Management fees	$	$	$
Mortgage interest paid to banks	$	$	$
Other interest	$	$	$
Repairs	$	$	$
Supplies	$	$	$
Taxes	$	$	$
Utilities	$	$	$
Other (list)	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$

Property Information

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

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

Asset / Property name (**list each property - include Purchase HUDs**)	Date purchased	Cost	Date placed in service
		$	
		$	
		$	

Property Sold or Taken Out of Service

Asset / Property name (if multiple)	Date sold or taken out of service	Selling price	Trade in?
		$	
		$	
		$	