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).

	Property A		*Property B*		*Property C*	
	Location of property:		Location of property:		Location 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	$		$		$	
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 before 2019.

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?*
		$	
		$	
		$	
		$	
		$	