

RENTAL PROPERTY WORKSHEET

CLIENT NAME (OWNER)

SINGLE FAMILY

MULTI-FAMILY

ROOM OR APARTMENT

COMMERCIAL

ADDRESS OF RENTAL (use separate worksheet for each rental you own)

If purchased this Year – Date: _____ Cost (Provide closing statement) _____

Was this rental property used as your primary or secondary residence at any time during the tax year? Yes No

Was the property available for rent the entire year? YES NO Date property available: _____ THRU _____

Number of days available for rent: _____ Number of days *actually* rented: _____ Number of days of personal use: _____

Was property sold (provide the settlement sheet)? YES NO Date sold: _____

Did you make any payments during the year that would require you to file Form(s) 1099? YES NO

If "Yes", did you or will you file required Form(s) 1099? YES NO

INCOME

Total Rental Income

EXPENSES

Advertising		
Cleaning and Maintenance		
Commissions		
Insurance – Property and liability		
Legal and Professional fees		
Management Fees		
Mortgage Interest (Provide Form 1098)		
Other Interest (credit cards/other loans for rental)		
Repairs (for repairs exceeding \$2500, report in major repairs section)		
Supplies		
Real Estate Property Taxes – paid through escrow by your mortgage (Provide Form 1098)		
Real Estate Property Taxes – paid by you directly		
Utilities		
Phone expense	Landline	Cell
Dues, Fees, and Licenses (HOA dues, Permits, Registration Fees)		
Other expenses:		
Other expense:		
Other expense:		

Vehicle Expenses

Make, model and year of vehicle: _____

Month/day/year vehicle was placed in service this tax year (if different vehicle than prior year): _____

Do you have written records showing the date, miles and business purpose for each trip? Yes No

Mileage		Actual Expenses	
Total Miles Driven:		Gasoline, oil, lube:	
Total Business Miles:		Repairs, parts, wash:	
Parking, tolls, license		Tires, batteries, supplies, etc.	
		Insurance	
Odometer (beginning of year):		Interest expense:	
Odometer (end of year):		License Fees/Other specify	

Purchases and Sales of Equipment & Major Repairs

Item Description	Date Purchased	Cost	Business % of Use	Date Sold	Sale Price

Notes: