

SIMPLE ACCOUNTING RENTAL TAX PREPARATION INTAKE FORM

Date:

Name		Tax Year
Rental Address		
City	State	Zip
Contact Person	Cell Phone	Preferred Method of Contact
Email	Date Rental Started	

Part 1 - Income (Attach any 1099 Forms Received)

Deposit Income
Rental Income
Extra Charges Income

Purchase Year
Purchase Price
Other Auto Expenses

Part 2 – Non-Direct Expenses

Advertising (posters, Cards, Pens, Etc)
Bank Charges
Licenses & Fees
Non Property Interest
Office Supplies
Professional Fees (Legal, Tax Prep, Acct)
Property Management Fees
Telephone (business use only)
Repairs & Maintenance Exp
Other Expenses (Attach Detail)

Part 4 – Direct Expenses

Days Available for Rent
Days Rented
Sq Footage of Rental Portion (if not entirely a rental)
Mortgage Interest
Property Taxes
Power
Gas
Water
Garbage
Repairs & Maintenance
Insurance
Other

Part 3 – Vehicle Information

Vehicle Year & Model
Total Mileage
Business Mileage
Actual Expenses
Gas
Repairs
Insurance
Interest on Loan

Part 5 – Large Repairs or Improvements (Cost over \$2500)

Item
Cost

To the best of my knowledge the information enclosed on this client tax organizer is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Taxpayer Signature

Date

Spouse Signature

Date