RENTAL PROPERTY ORGANIZER

Property Address: ____________________________

**Please submit form(s) 1098 mortgage interest statement(s).

**If you are a first-year client, we need to collect the prior year depreciation schedule. This may require you contact your prior preparer.

1. Who carries the mortgage? _____________________ Acct ending w/_________
   Second mortgage? _____________________ Acct ending w/_________

2. Days occupied by renters: (needed annually) *_________ days

3. Personal Use Days (if any): (needed annually) *_________ days

4. Did you make payments that would require you to file forms 1099?  YES or NO (Circle one. If yes, complete a 1099 Request form or provide copy of form 1096.)

5. Rental Income Received: $_________

6. Advertising: $_________

7. Cleaning and Maintenance: $_________

8. Homeowner’s Insurance: $_________

9. Legal/Professional Fees: $_________

10. Management Fees: $_________

11. Mortgage Interest: $_________

12. Repairs & Maintenance Costs: $_________

13. Supplies: $_________

14. Real estate taxes paid: (not reported on 1098 provided, if any) $_________

15. Utilities paid: $_________

16. HOA Fees: $_________

17. Other expenses: Description: ____________________________ $_________

18. Auto Expenses to maintain property: Please obtain and complete a “Vehicle Recap”.

19. Capital improvements/new assets purchased for the rental (current year):

   Date   Cost  Description
   a. ___________ $________
   b. ___________ $________

20. For properties not listed as rentals in prior years:
   a. Date the property was put out for rent: ____________________________
   b. Purchase price (including closing costs): $_________
   c. Capital improvements prior to renting: ____________________________