

Information we are waiting for:

Questions:

Rental Income and Expenses for 2023 Tax Year

First year of rental income: **Yes/No**

What portion of the yr. was your property rented or trying to be rented? _____ months

Name of Rental Business: _____

Full Address: _____

Phone # _____ Ownership Interest: _____

Do you live in a portion of the rental bldg? **Yes/No**

If yes complete the following: Total sq. footage of unit: _____

Sq. footage of rental space: _____

Personal portion percentage: _____

Gross Rent: _____

Expenses

Advertising: _____

Insurance: _____

Mortgage Interest _____

Office Expenses: _____

Legal, acct., & professional fees _____

Management & Admin Fees: _____

Maintenance & Repairs (100% for rental unit): _____

Maintenance & Repairs (prorated for rental unit): _____

Salary/Wages: _____

Property Taxes: _____

Travel: _____

Utilities: _____

Landscaping costs: _____

Other: _____

Auto Expenses only claimable if you have 2 or more properties away from your place of residence:

Total rental related km's driven _____ Total km's driven _____

Fuel _____ Repair & Maint _____ Insurance: _____ Lic.®.: _____

Leasing-Date lease started _____ Value of vehicle _____

Car washes _____ Parking _____ Interest on car loan: _____

Type of vehicle: _____

Capital Expenditures:

Renovations & Upgrades: _____

Any U.C.C. _____

Purchase or rollover of appliances or furniture: _____