

# 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).

|                                 | <i>Property A</i>       |                          | <i>Property B</i>       |                          | <i>Property C</i>       |                          |
|---------------------------------|-------------------------|--------------------------|-------------------------|--------------------------|-------------------------|--------------------------|
|                                 | Address of property:    |                          | Address of property:    |                          | Address of property:    |                          |
|                                 |                         |                          |                         |                          |                         |                          |
|                                 | Type                    |                          | Type                    |                          | Type                    |                          |
|                                 | Any personal use?       | Yes No                   | Any personal use?       | Yes No                   | Any personal use?       | Yes No                   |
|                                 | <i>Fair Rental Days</i> | <i>Personal Use Days</i> | <i>Fair Rental Days</i> | <i>Personal Use Days</i> | <i>Fair Rental Days</i> | <i>Personal Use Days</i> |
|                                 |                         |                          |                         |                          |                         |                          |
| Date placed in service          |                         |                          |                         |                          |                         |                          |
| Rents received                  | \$                      |                          | \$                      |                          | \$                      |                          |
| <b>Expenses</b>                 |                         |                          |                         |                          |                         |                          |
| Advertising                     | \$                      |                          | \$                      |                          | \$                      |                          |
| Auto and travel                 | \$                      |                          | \$                      |                          | \$                      |                          |
| 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 2023.

**Property Purchased.** Treat the cost of improvements made to real property as the purchase of a new asset.

| <i>Asset</i> | <i>Date purchased</i> | <i>Cost</i> | <i>Date placed in service</i> |
|--------------|-----------------------|-------------|-------------------------------|
|              |                       | \$          |                               |
|              |                       | \$          |                               |
|              |                       | \$          |                               |
|              |                       | \$          |                               |
|              |                       | \$          |                               |

**Property Sold or Taken Out of Service**

| <i>Asset</i> | <i>Date sold or taken out of service</i> | <i>Selling price</i> | <i>Trade in?</i> |
|--------------|--|----------------------|------------------|
|              |  | \$                   |                  |
|              |  | \$                   |                  |
|              |  | \$                   |                  |
|              |  | \$                   |                  |
|              |  | \$                   |                  |