

# 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).

|                                 | Property A              |                          | Property B              |                          | Property C              |                          |
|---------------------------------|-------------------------|--------------------------|-------------------------|--------------------------|-------------------------|--------------------------|
|                                 | 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.

| Asset | Date purchased | Cost | Date placed in service |
|-------|----------------|------|------------------------|
|       |                | \$   |                        |
|       |                | \$   |                        |
|       |                | \$   |                        |
|       |                | \$   |                        |
|       |                | \$   |                        |

## Property Sold or Taken Out of Service

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