



YOUR INFORMATION

Name (First, Mi, Last)
 First M.I. Last

Social Security No. Email

PHYSICAL ADDRESS (Rental)

Street Address (home or office):

City State Zip Code

Outside U.S. Only Foreign Province/State

Foreign Country Postal Code

Single Family Vacation/Short-Term Land Self-Rental Multi-Family

Commercial Other (describe)

Full-year rental? Yes No If No, Date Started: Date Ended:

INCOME

Rent Collected from Tenants	\$
Other Income (describe)	\$
Other Income (describe)	\$

Rent Refunded to Tenants	(-)	\$
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Did you collect advance rent for a period after the tax year? Yes No

Did you receive any payments for a canceled lease? Yes No

Were any rental expenses paid by a tenant that were reimbursed with reduced rent? Yes No

Did any tenant trade their services for rent? Yes No

Do you have a separate bank account for your rental activities? Yes No



EXPENSES			
Accounting	\$	Management Fees	\$
Advertising	\$	Mortgage Interest	\$
Bank Fees	\$	Pool Services	\$
Cleaning And Maintenance	\$	Repairs	\$
Commissions	\$	Supplies	\$
Gardening	\$	Taxes: Occupancy	\$
Hoa Dues	\$	Taxes: Property	\$
Insurance: Hazard	\$	Utilities :	\$
Insurance: Landlord	\$	Other:	\$
Legal Fees	\$	Other:	\$

Improvements & Assets	Purchase Date	Description	Total Cost
Appliances (5-Year)			\$
Carpenting (5-Year)			\$
Furniture (in rental property) (5-Year)			\$
Fences & Shrubbery (7-Year)			\$
Additions & Improvements (27.5-Year)			\$
Other			\$
Other			\$

Tax Document Checklist

- Form 1098 (Mortgage Interest)
- Property Tax Bill (Secured)
- Supplemental Property Tax
- Rental Agreement
- Management's Annual Statement
- Prior-Year Depreciation Schedules *New Clients Only*
- Invoice - Depreciable Improvements; current year only)
- Receipts - Depreciable Assets; current year only