

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
	Fair Rental Days	Personal Use Days	Fair Rental Days	Personal Use Days	Fair Rental Days	Personal Use Days
Date placed in service						
Rents received	\$		\$		\$	

Security deposits. A security deposit is not included in rental income if you plan to return it to the tenant at the end of the lease. If any amount is forfeited by the renter during the year, include that amount as rental income.

Expenses			
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)	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

Large Purchases (Improvements/Equipment)

If this is your first year with our firm, please provide a depreciation schedule for all property placed in service before 2025.

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?
		\$	
		\$	
		\$	
		\$	
		\$	