

Rental Property Checklist

PURCHASE INFO:

Purchased as a rental? Y or N Do you live in part of property? Y or N

Price paid: \$ _____ Date purchased _____

SALE INFO: (if sold in year)

Was property sold in tax year? Y or N. If Yes, what was sale price: \$ _____

Expenses to prepare for sale:

Address of Property: # of units: _____

Rental Income for year \$ _____

(provide totals for year)

Rental Expenses: (Current for entire tax year)

Advertising \$ _____

Home Insurance \$ _____ Utilities \$ _____

Mortgage or

Line of Credit Interest \$ _____ (interest portion only claimable)

Office Expenses \$ _____ Management Fees \$ _____

Supplies \$ _____ Legal, acctg, other fees \$ _____

Maintenance & Rep \$ _____ Travel \$ _____

Property Taxes \$ _____ Other Expenses \$ _____

The only thing you cannot add up in a category is items purchased for > \$200;
For example, new appliances, etc. Those needed to be given to me on a
separate list itemized with item and cost.

"Let us worry about your taxes, so you don't have to"

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