

Property Address: _____ Your Name: _____ Year of Expenses: _____

Rental Property Worksheet

Type of Property _____ (Enter 1 thru 8)

Did you use it personally during the year? Yes No

Ownership percentage (if not 100%) _____ %

Income:

Rents collected (*do not include security deposits*) \$ _____

Expenses:

Advertising \$ _____

Auto & Travel \$ _____

Cleaning & Maintenance \$ _____

Commissions paid to others \$ _____

Insurance \$ _____

Legal/Professional fees \$ _____

Management fees \$ _____

Mortgage Interest \$ _____

Private Mortgage Insurance – Qualified Mortgage Insurance \$ _____

Other Interest \$ _____

Repairs \$ _____

Supplies \$ _____

Real Estate Taxes \$ _____

Utilities \$ _____

HOA or Condo fees \$ _____

Bank charges \$ _____

Warranties \$ _____

Cell Phone Total Expense \$ _____ x Business Use % _____ = \$ _____

Equipment and Computers costing > \$2500 (Provide a fully detailed description, purchase date & amount for each asset)

_____ \$ _____

_____ \$ _____

_____ \$ _____

Major Purchases (Provide a fully detailed description, purchase date & amount for each asset)

_____ \$ _____

_____ \$ _____

_____ \$ _____

Answer the following questions:

	Yes	No
Do you have a separate bank account for your rentals?.....	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a separate bank account for security deposits?.....	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a written lease agreement for this rental? Provide a copy of the lease.....	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay \$600 or more to a service provider, contractor, or for rent?.....	<input type="checkbox"/>	<input type="checkbox"/>
- If yes, did you send them a Form 1099-Misc? If yes, provide copies of the form.....	<input type="checkbox"/>	<input type="checkbox"/>

I certify the above information is true and accurate, and I have receipts to confirm proof of payments and documentation to support my responses.

Signature

Date