

RENTAL PROPERTY WORKSHEET

PLEASE FILL OUT A SEPARATE WORKSHEET FOR EACH RENTAL PROPERTY

PROPERTY ADDRESS: _____
 STREET ADDRESS, CITY STATE AND ZIP

TYPE OF PROPERTY: RESIDENTIAL MULTI UNIT COMMERCIAL LAND
 VACATION/SHORT TERM

DATE PLACED IN SERVICE (NEW CUSTOMER/NEW RENTAL ONLY): _____

PURCHASE PRICE \$ _____ IMPROVEMENTS (BEFORE RENTING)
 \$ _____ *

IS THIS YOUR MAIN HOME SECOND HOME
 DO YOU LIVE IN THIS HOME AND RENT A PORTION OF THE HOME? YES NO

IF YES, PLEASE FILL OUT SQUARE FOOTAGE BELOW -

IF AIRBnB or other short term rental: DO NOT INCLUDE SHARED SPACES IN SQ FOOTAGE OF RENTAL

SQUARE FOOTAGE OF RENTAL: _____ TOTAL SQUARE FOOTAGE OF HOME: _____

INCOME	\$
TOTAL RENT RECEIVED	\$
PORTION OF RENT REPORTED ON 1099 K	\$
PORTION OF RENT REPORTED ON 1099 MISC	
NON-REFUNDABLE DEPOSITS	\$
REFUNDABLE DEPOSITS	\$
REFUNDABLE DEPOSITS FORFEITED BY TENANTS	\$
VALUE OF SERVICE OR PROPERTY IN LIEU OF RENT	\$
RENTS REFUNDED	\$

EXPENSES	\$
ADVERTISING	\$
HOA DUES	\$
CLEANING AND MAINTENANCE	\$
PROPERTY MANAGEMENT	\$
INSURANCE	\$
LEGAL AND PROFESSIONAL	\$
MORTGAGE INTEREST	\$
OTHER INTEREST	\$
REPAIR SUPPLIES	\$
REPAIR LABOR/CONTRACTOR 1099? <input type="checkbox"/> ISSUED? <input type="checkbox"/>	\$
OTHER SUPPLIES (IF AIRBNB - MAY INCLUDE FOOD, TOILETRIES)	\$
PROPERTY TAX	\$
UTILITIES	\$
YARD/LANDSCAPE SUPPLIES AND MAINTENANCE	\$
OTHER EXPENSES	\$

Preparer Use Only: Building Basis \$
Property Sold []

Land Basis \$
Some investment not at risk []

FOR AUTO EXPENSES, PLEASE FILL OUT THE AUTO WORKSHEET
 FOR IMPROVEMENTS, APPLIANCE/FURNITURE PURCHASES AND TRAVEL, SEE OTHER SIDE

DID YOU MAKE ANY **IMPROVEMENTS*** SUCH AS A NEW ROOF, NEW FLOORING OR A FENCE?
 IF YES, PLEASE PROVIDE THE FOLLOWING INFORMATION:

DESCRIPTION	DATE COMPLETED	COST

DID YOU PURCHASE ANY NEW **APPLIANCES** OR **FURNITURE**? IF YES, PLEASE PROVIDE THE FOLLOWING INFORMATION:

DESCRIPTION	DATE PURCHASED	COST

TRAVEL EXPENSES:

AIRFARE	\$
HOTEL	\$
CAR RENTAL	\$
FUEL FOR CAR RENTAL	\$
BUS/TRAIN/TAXI	\$
PARKING AND TOLLS	\$
OTHER	\$