

RENTAL PROPERTY WORKSHEET

PLEASE FILL OUT A 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 INDICATE % OF SQUARE FOOTAGE THAT IS EXCLUSIVELY RENTAL: _____

| 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 | \$ |
| PROPERTY TAX | \$ |
| UTILITIES | \$ |
| YARD/LANDSCAPE SUPPLIES AND MAINTENANCE | \$ |
| OTHER EXPENSES | \$ |

FOR AUTO EXPENSES, PLEASE FILL OUT THE AUTO WORKSHEET

FOR IMPROVEMENTS, APPLIANCE PURCHASES AND TRAVEL, SEE OTHER SIDE

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

Land Basis \$
Some investment not at risk []

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**? IF YES, PLEASE PROVIDE THE FOLLOWING INFORMATION:

| DESCRIPTION | DATE PURCHASED | COST |
|-------------|----------------|------|
| | | |
| | | |
| | | |
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| | | |

TRAVEL EXPENSES:

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