

**RENTAL PROPERTY WORKSHEET**

PLEASE FILL OUT A SEPARATE WORKSHEET FOR EACH RENTAL PROPERTY

PROPERTY 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? YES NO  
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? YES ISSUED	\$
OTHER SUPPLIES (IF AIR BNB - MAY INCLUDE FOOD, TOILETRIES) \$	
PROPERTY TAX	\$
UTILITIES	\$
YARD/LANDSCAPE SUPPLIES AND MAINTENANCE	\$
OTHER EXPENSES	\$

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