



### Rental Property Organizer

Property Address: \_\_\_\_\_  
 \_\_\_\_\_

Tax Year \_\_\_\_\_

Property Type: Residential                      Commercial                      Vacation                      Other

Did you pay a service provider more than \$600?                      Yes                      No

If yes, have you issued IRS Form 1099-Misc?(Only to Non-Incorporated providers and/or Attorney's)                      Yes                      No

Were you actively involved in the management of this property?                      Yes                      No

Are you a real estate professional? (Must work more than 750 hours in the real estate trade)                      Yes                      No

Was the property used personally by the owner, family of the owner or acquaintance at a reduced rate?                      Yes                      No

If there is personal use please indicate number of days used \_\_\_\_\_ and number of days rented \_\_\_\_\_

Did you acquire this property last year? If yes please provide the purchase closing statement and list of all improvements made.  
 If you sold a rental property last year please provide the closing statement from the sale.

Rental Income: \$ \_\_\_\_\_

Expenses

Advertising \$ \_\_\_\_\_

Auto and Travel \$ \_\_\_\_\_

Cleaning & Maintenance \$ \_\_\_\_\_

Commissions \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Legal and Professional Fees \$ \_\_\_\_\_

Management Fees \$ \_\_\_\_\_

Mortgage Interest \$ \_\_\_\_\_

Other Interest \$ \_\_\_\_\_

Repairs (Minor/Non-improvement) \$ \_\_\_\_\_

Supplies \$ \_\_\_\_\_

Taxes \$ \_\_\_\_\_

Utilities \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

#### Property Improvements and Acquisitions

Includes renovations, major repairs that extend the life of the property, appliance, HVAC, flooring

Description \_\_\_\_\_

Cost \_\_\_\_\_ Date in Service \_\_\_\_\_

Description \_\_\_\_\_

Cost \_\_\_\_\_ Date in Service \_\_\_\_\_

Description \_\_\_\_\_

Cost \_\_\_\_\_ Date in Service \_\_\_\_\_

Description \_\_\_\_\_

Cost \_\_\_\_\_ Date in Service \_\_\_\_\_

Description \_\_\_\_\_

Cost \_\_\_\_\_ Date in Service \_\_\_\_\_

Description \_\_\_\_\_

Cost \_\_\_\_\_ Date in Service \_\_\_\_\_

If this is the first year that we are preparing your return please provide us with the depreciation schedule from your prior tax return.

Notes: