

Tax Organizer

Rental Property

Use the following to enter rental income and expenses.

Rental Property Address	
Dates Rented If less than entire year (for full rental properties)	
# Days used personally If entire property is rented (full rental)	

Partial Rental

If a portion of your residence is used for rental purposes, please complete the following.

Square footage of entire home	
Square footage of rental space	
# of days rented	

Rental Income

Include rents received for property listed above.

Rental Income Received	
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Rental Expenses

Include expenses for property listed above.

Description	Amount
Advertising	
Travel	
Auto Expense - Miles Driven	
Cleaning and Maintenance	
Insurance	

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Description	Amount
Legal & Professional Eviction fees, etc.	
Management Fees	
Mortgage Interest	
Repairs	
Supplies Filters, paint, etc.	
Property Taxes	
Utilities	
HOA fees	
Pest Control	

Rental Capital Expenditures

If any major projects were completed or appliances purchased for the rental property include the details below. For example - new carpeting, new roof, remodeling, new refrigerator, etc.

Project/Item Purchased	Date in Service	Total Cost

Was the property refinanced in the tax year?

Yes No

Was the property available for rent all year?

Yes No