

INTAKE – Rental Property

Complete and return this form if you own property that you rent to another person or business.

Tax Year: _____

PAYER INFORMATION

Client Name _____

Business name from which rentals are handled, if different _____

Social Security / EIN # _____

Address _____ City, State, Zip _____

Phone # _____ Email _____

REQUIRED –

If you paid \$600 or more to subcontractors, you must file form 1099-NEC for their labor cost by January 31st.

*Did you make any payments in this tax year that would require you to file Form(s) 1099? ____ Yes ____ No

*If “yes”, did you or will you file required Form(s) 1099? ____ Yes ____ No

Do you have an Office in Your Home? ____ Yes ____ No

If Yes

Sq Ft of Office _____

Sq Ft of Home _____

Real Estate Taxes \$ _____

Mortgage Interest \$ _____

HO Insurance \$ _____

Utilities \$ _____

PROPERTY	DESCRIPTION <i>(Single-Family, Mixed-Use, Condo, Townhouse, Etc)</i>	ADDRESS <i>Street, City, State, Zip</i>	DATE RENTAL STARTED	RENTAL PROPERTY - PURCHASED/SOLD					
				Date Purchased	Original Cost	Land Cost	Date Sold	Sold Amount	Closing Costs
A									
B									
C									
D									
E									

Please do not hesitate to contact us if you have any questions

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	PROPERTY A	PROPERTY B	PROPERTY C	PROPERTY D	PROPERTY E
PROPERTY INFORMATION					
# of days available for rent:					
# of days actually rented:					
# of days of personal use:					

Business Miles Driven					
*Do you have "evidence" to support your mileage?	_____ Yes		_____ No		
*If yes, is the "evidence" written?	_____ Yes		_____ No		

RENTAL INCOME	Property A	Property B	Property C	Property D	Property E
Rents (Do not include refundable deposits)					
Other					

EXPENSES	Property A	Property B	Property C	Property D	Property E
Advertising & Marketing					
Auto & Travel					
Cleaning & Maintenance					
Commissions					
Insurance					
Legal & Accounting Fees					
Property Management Fees					
Mortgage Interest (Provide 1098)					
Other Interest					
Repairs					
Supplies					
Taxes - Property (Provide 1098)					
Taxes - Other					
Utilities - Water, Gas, Electric					

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Depreciation					
Other:					
Association Dues (HOA)					
Bank Charges					
Continuing Education					
Dues & Subscriptions					
Lawn Care					
Office Supplies					
Pest Control					
Telephone					
Other _____					
Other _____					
PURCHASES	Property A	Property B	Property C	Property D	Property E
Improvements <i>(under \$2,500)</i>					
Description					
Date of Purchase					
Cost					
Capital Improvements <i>(over \$2,500)</i>					
Description					
Date of Purchase					
Cost					
AIRBNB, VRBO & SHORT TERM RENTAL					
How many days was property rented during the year?					
Sales Tax Collected/Paid					
Fees Paid to Online Services					
Was average stay of guests 7 days or less?					

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Do you have an Office in Your Home? **Yes** **No**

If Yes

Sq Ft of Office _____

Sq Ft of Home _____

Real Estate Taxes \$ _____

Mortgage Interest \$ _____

HO Insurance \$ _____

Utilities \$ _____

- Rental property deductions are available for Ordinary and Necessary expenses.
- Retain your related receipts, documents and spreadsheet(s) from your rental for your own records

Please note any questions or comments regarding your rental property-

I certify that I have listed all income, all expenses, and I have documentation to prove the figures entered on this worksheet for preparation of m income tax return.

Name (Print): _____**Signature:** _____**Date:** _____**Title:** _____

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