Name: _____

Rental Property Tax Organizer

Rental Income and Expenses

Indicate type of rental as "residential" or "nonresidential."

	Property A	*Property B*	*Property C*
	Type and location of property:	Type and location of property:	Type and location of property:
	Any personal use? ○ Yes ○ No	Any personal use? ☐ Yes ☐ No	Any personal use? ○ Yes ○ No
Date placed in service			
Rents received	$	$	$
Expenses			
Advertising	$	$	$
Cleaning and maintenance	$	$	$
Commissions	$	$	$
Insurance	$	$	$
Legal and professional fees	$	$	$
Management fees	$	$	$
Mortgage interest paid to banks	$	$	$
Other interest	$	$	$
Repairs	$	$	$
Supplies	$	$	$
Taxes	$	$	$
Utilities	$	$	$
Other (list)	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$

Property Information

If this is your first year with our firm, please provide a depreciation schedule for all property placed in service before 2015.

Property Purchased. Treat the cost of improvements made to real property as the purchase of a new asset.

Asset	*Date purchased*	*Cost*	*Date placed in service*
		$	
		$	
		$	
		$	
		$	
		$	

Property Sold or Taken Out of Service

Asset	*Date sold or taken out of service*	*Selling price*	*Trade in?*
		$	
		$	
		$	
		$	
		$	
		$	