## Rental Property Tax Organizer

The Rental Property Organizer has been designed to help collect and organize the rental property information that we will need in the preparation of your income tax returns. This is the information we will be using to prepare your tax returns and sending to the IRS, please verify it is complete and accurate before submitting.

list of items we will need before we can prepare your taxes:  Completed Organizer (see below)
<b>Prior Years Asset Detail Schedule</b> - This schedule is a part of your prior year tax return. It details all assets placed into service for your rental property (house, land, furniture, etc.). If it was not include when you sent your prior year tax return to us, please send it now.
<b>Copies of Tax Forms</b> - Please make sure that any copies of 1099s, 1098s, or any other tax forms that are related to your rental property(ies) are included.
<b>Additional Items</b> - Although the organizer is fairly comprehensive, it is certainly possible that there are items pertinent to your taxes that are not addressed. Please include these documents with your organizer.

If there are questions or sections you are not sure about, please note them and we will discuss them before finalizing and filing your returns.

Property A - Check the type of property	
Single family Multi-family Vacation/short-term	O Land O
Commercial Self-Rental Other (describe)	
Property Address	
CityState Zip	
Number of days rental was available for rent	
at fair market value during tax year	
Number of days of personal use during tax year	
Number of days vacant during tax year	
Income	\$
Total Rents Received	
Portion of rents reported on Form 1099-K	
Non-refundable deposits received	
Refundable deposits forfeited by tenants	
Value of service or property received in	
lieu of rent	
Rents refunded	
Expenses	\$
Advertising	
Auto & Travel (complete wksht on page 4)	
Association Dues/Fees	
Cleaning & Maintenance	
Commissions	
Insurance	
Improvements (list on page 3)*	
Legal & Professional	
Management Fees	
Interest (Mortgage paid to banks)	
Interest - Other	
Repairs (list improvements on page 3)*	
Supplies	
Taxes	
Tax Preparation Fees	
Utilities - Electric	
Utilities - Gas	
Utilities - Water/Sewer	
Utilities - Garbage	
Telephone, Cell, Internet	
Yard/Landscaping maintenance	
Other Expenses	
	-
	-
	-
	-

City State Zi  Number of days rental was available for ren at fair market value during tax year  Number of days of personal use during tax year  Number of days vacant during tax year  Income  Total Rents Received  Portion of rents reported on Form 1099-K  Non-refundable deposits received  Refundable deposits forfeited by tenants	
at fair market value during tax year Number of days of personal use during tax year Number of days vacant during tax year Income Total Rents Received Portion of rents reported on Form 1099-K Non-refundable deposits received Refundable deposits forfeited by tenants	
Number of days vacant during tax year Income Total Rents Received Portion of rents reported on Form 1099-K Non-refundable deposits received Refundable deposits forfeited by tenants	\$
Income Total Rents Received Portion of rents reported on Form 1099-K Non-refundable deposits received Refundable deposits forfeited by tenants	\$
Total Rents Received Portion of rents reported on Form 1099-K Non-refundable deposits received Refundable deposits forfeited by tenants	<b>&gt;</b>
Portion of rents reported on Form 1099-K  Non-refundable deposits received  Refundable deposits forfeited by tenants	
Non-refundable deposits received Refundable deposits forfeited by tenants	
Refundable deposits forfeited by tenants	
Value of service or property received in	
lieu of rent	
Rents refunded	<u> </u>
Expenses	\$
Advertising	
Auto & Travel (complete wksht on page 4)	
Association Dues/Fees	
Cleaning & Maintenance	
Commissions	
Insurance	
Improvements (list on page 3)*	
Legal & Professional	
Management Fees	
Interest (Mortgage paid to banks)	
Interest - Other	
Repairs (list improvements on page 3)*	
Supplies	
Taxes	
Tax Preparation Fees	
Utilities - Electric	
Jtilities - Gas	_
Jtilities - Water/Sewer	
Jtilities - Garbage	
Telephone, Cell, Internet	
/ard/Landscaping maintenance	Dalling Delegation of the Control
Other Expenses	

<sup>\*</sup>Improvements result in a betterment to the property and restores the property. Examples include room additions, new roof, furniture, new appliances, carpet, etc. Repairs prolong life of assets such as repainting, fixing gutters, and replacing broken windows

Property C - Check t	he type of pr	operty	
Single family O Multi-fan Commercial O Self-Renta			Land O
Property Address			
City	State	Zip_	
Number of days renta at fair market value d		e for rent	
Number of days of perso	onal use during t	tax year	
Number of days vacant of	during tax year		
Income			\$
Total Rents Received			
Portion of rents report	ed on Form 10	)99-К	
Non-refundable depos	its received		
Refundable deposits fo	orfeited by ten	ants	
Value of service or pro	perty received	in	
lieu of rent			
Rents refunded			
Expenses			\$
Advertising			
Auto & Travel (complet	te wksht on pa	ge 4)	
Association Dues/Fees			
Cleaning & Maintenand	ce		
Commissions			
Insurance			
Improvements (list on )	page 3)*		
Legal & Professional			
Management Fees			
Interest (Mortgage pai	d to banks)		
Interest - Other			
Repairs (list improveme	nts on page 3)	<b>)</b> *	
Supplies			
Taxes			
Tax Preparation Fees			
Utilities - Electric			
Utilities - Gas			
Utilities - Water/Sewer			
Utilities - Garbage			
Telephone, Cell, Interne	et		
Yard/Landscaping main	tenance		
Other Expenses			

City State Zip	
at fair market value during tax year  Number of days of personal use during tax year  Number of days vacant during tax year  Income  Total Rents Received  Portion of rents reported on Form 1099-K  Non-refundable deposits received  Refundable deposits forfeited by tenants  Value of service or property received in lieu of rent  Rents refunded  Expenses  Advertising  Auto & Travel (complete wksht on page 4)  Association Dues/Fees  Cleaning & Maintenance  Commissions  Insurance  Improvements (list on page 3)*  Legal & Professional  Management Fees  Interest (Mortgage paid to banks)  Interest - Other  Repairs (list improvements on page 3)*  Supplies  Taxes  Tax Preparation Fees  Utilities - Electric  Utilities - Gas  Jtilities - Water/Sewer  Jtilities - Garbage  Felephone, Cell, Internet  (ard/Landscaping maintenance	
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Value of service or property received in lieu of rent  Rents refunded  Expenses \$ Advertising Auto & Travel (complete wksht on page 4) Association Dues/Fees Cleaning & Maintenance Commissions Insurance Improvements (list on page 3)* Legal & Professional Management Fees Interest (Mortgage paid to banks) Interest - Other Repairs (list improvements on page 3)* Supplies Taxes Tax Preparation Fees Utilities - Electric Utilities - Gas Jtilities - Water/Sewer Jtilities - Garbage Telephone, Cell, Internet (ard/Landscaping maintenance	
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Auto & Travel (complete wksht on page 4)  Association Dues/Fees  Cleaning & Maintenance  Commissions  Insurance  Improvements (list on page 3)*  Legal & Professional  Management Fees  Interest (Mortgage paid to banks)  Interest - Other  Repairs (list improvements on page 3)*  Supplies  Taxes  Tax Preparation Fees  Utilities - Gas  Utilities - Water/Sewer  Utilities - Garbage  Telephone, Cell, Internet  Yard/Landscaping maintenance	
Association Dues/Fees Cleaning & Maintenance Commissions Insurance Improvements (list on page 3)* Legal & Professional Management Fees Interest (Mortgage paid to banks) Interest - Other Repairs (list improvements on page 3)* Supplies Taxes Tax Preparation Fees Utilities - Electric Utilities - Gas Utilities - Water/Sewer Utilities - Garbage Telephone, Cell, Internet Yard/Landscaping maintenance	
Cleaning & Maintenance  Commissions  Insurance  Improvements (list on page 3)*  Legal & Professional  Management Fees  Interest (Mortgage paid to banks)  Interest - Other  Repairs (list improvements on page 3)*  Supplies  Taxes  Tax Preparation Fees  Utilities - Electric  Utilities - Gas  Utilities - Water/Sewer  Jtilities - Garbage  Telephone, Cell, Internet  (ard/Landscaping maintenance	
Commissions Insurance Improvements (list on page 3)* Legal & Professional Management Fees Interest (Mortgage paid to banks) Interest - Other Repairs (list improvements on page 3)* Supplies Taxes Tax Preparation Fees Utilities - Electric Utilities - Gas Utilities - Water/Sewer Jtilities - Garbage Telephone, Cell, Internet (Ard/Landscaping maintenance	
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Improvements (list on page 3)*  Legal & Professional  Management Fees  Interest (Mortgage paid to banks)  Interest - Other  Repairs (list improvements on page 3)*  Supplies  Taxes  Tax Preparation Fees  Utilities - Electric  Utilities - Gas  Utilities - Water/Sewer  Utilities - Garbage  Telephone, Cell, Internet  Yard/Landscaping maintenance	
Legal & Professional  Management Fees  Interest (Mortgage paid to banks)  Interest - Other  Repairs (list improvements on page 3)*  Supplies  Taxes  Tax Preparation Fees  Utilities - Electric  Utilities - Gas  Utilities - Water/Sewer  Jtilities - Garbage  Telephone, Cell, Internet  Yard/Landscaping maintenance	
Management Fees Interest (Mortgage paid to banks) Interest - Other Repairs (list improvements on page 3)* Supplies Taxes Tax Preparation Fees Utilities - Electric Utilities - Gas Utilities - Water/Sewer Utilities - Garbage Telephone, Cell, Internet Yard/Landscaping maintenance	
Interest (Mortgage paid to banks)  Interest - Other  Repairs (list improvements on page 3)*  Supplies  Taxes  Tax Preparation Fees  Utilities - Electric  Utilities - Gas  Utilities - Water/Sewer  Utilities - Garbage  Telephone, Cell, Internet  Yard/Landscaping maintenance	
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Repairs (list improvements on page 3)*  Supplies  Taxes  Tax Preparation Fees  Utilities - Electric  Utilities - Gas  Utilities - Water/Sewer  Utilities - Garbage  Telephone, Cell, Internet  Yard/Landscaping maintenance	
Supplies  Taxes  Tax Preparation Fees  Utilities - Electric  Utilities - Gas  Utilities - Water/Sewer  Utilities - Garbage  Telephone, Cell, Internet  Yard/Landscaping maintenance	
Taxes  Tax Preparation Fees  Utilities - Electric  Utilities - Gas  Utilities - Water/Sewer  Utilities - Garbage  Telephone, Cell, Internet  Yard/Landscaping maintenance	
Tax Preparation Fees  Utilities - Electric  Utilities - Gas  Utilities - Water/Sewer  Utilities - Garbage  Telephone, Cell, Internet  Yard/Landscaping maintenance	
Utilities - Electric Utilities - Gas Utilities - Water/Sewer Utilities - Garbage Felephone, Cell, Internet Yard/Landscaping maintenance	
Utilities - Gas  Utilities - Water/Sewer  Utilities - Garbage  Felephone, Cell, Internet  Yard/Landscaping maintenance	
Utilities - Water/Sewer Utilities - Garbage Felephone, Cell, Internet Yard/Landscaping maintenance	
Jtilities - Garbage Felephone, Cell, Internet Fard/Landscaping maintenance	
Telephone, Cell, Internet  Yard/Landscaping maintenance	
/ard/Landscaping maintenance	
Other Expenses	NOW THE REAL PROPERTY.

<sup>\*</sup>Improvements result in a betterment to the property and restores the property. Examples include room additions, new roof, furniture, new appliances, carpet, etc. Repairs prolong life of assets such as repainting, fixing gutters, and replacing broken windows

You must report     For each asset bo	the purchase and disp ought or sold, provide	osition of the follow	all assets you u ing information	sed in your rentals o	during the tax year	
Property A						
Assets Purchased List	ting			Assets Sold or Dispo	osed Listing	- 6
					Disposition	
Description	Date Bought	Cost	Used/New?	Description	Date	Sale Price
				7		
Property B						
Assets Purchased List	ting			Assets Sold or Dispo	osed Listing	
					Disposition	
Description	Date Bought	Cost	Used/New?	Description	Date	Sale Price
						-
	À			/		
Property C Assets Purchased List	ing			Assets Sold or Dispo	osed Listing	
Assets Furthesed List	<u>,</u>			Assets sold of bispe	Disposition	
Description	Date Bought	Cost	Used/New?	Description	Date	Sale Price
ALL DESCRIPTION OF AUTOMOSPHER STATE		ects to a Netherland Const		1		
Property D				I	• • •	
Assets Purchased Listi	ing			Assets Sold or Dispo	osed Listing  Disposition	
Description	Date Bought	Cost	Used/New?	Description	Date	Sale Price
			<del> </del>			

**Asset Depreciation Worksheet** 

Business Use of Automobile			
If you used your automobile for act	ive conduct of your rent of of business use in the	t to prove business use of vehicles al business, you can claim expenses fo form of a mileage log or a written cale	
You may be eligible to claim a stand either case, you must maintain writ	dard mileage rate or clain ten records to support y	m actual operational expenses for your deduction.	rvehicle. In
Vehicle 1			
Purchase Price of vehicle			
Description (Model and Year)		Date vehicle was first used in your l	ousiness
For this tax year only, enter the nur	nber of miles your vehic		
	Business	Miles (not including commuting)	
	Commuti	ng Miles	
	All other	personal-use miles	
Interest paid on auto loan used to p	ourchase this vehicle		
Was the vehicle available for person	nal use? Yes O No O	Is another personal-use auto available	? Yes O No O
Do you have evidence to support th	is deduction? Yes 🔘 N	o O If "Yes", is the evidence written?	Yes O No O
Vehicle 1 Expenses (Provide these	expenses if you are NO	T claiming the standard mileage rate)	
Garage Rent		Repairs	
Gas		Tires	
Insurance		Tolls	
Licenses		Registration Fees	7
Oil	,	Other Expenses (list):	
Parking Fees			
Lease Payments			
Vehicle 2 Purchase Price of vehicle			
		Data vahiela was first used in your h	usinoss
Description (Model and Year) For this tax year only, enter the nun	abor of miles vaur vehiel	Date vehicle was first used in your k	Jusiness
roi tilis tax year only, enter the hun		Wiles (not including commuting)	1
	Commutir		
		personal-use miles	
Interest paid on auto loan used to p		personal-use mines	
		s another personal-use auto available	? Yes O No O
		o () If "Yes", is the evidence written?	
			100 0 110 0
	expenses if you are NOT	claiming the standard mileage rate)	
Garage Rent		Repairs	
Gas		Tires	
nsurance		Tolls	
Licenses		Registration Fees	
Oil Parking Fees	<u> </u>	Other Expenses (list):	
ease Payments			
Fravel Expense Worksheet			
Airfare		Lodging	
Bus, train, taxi		Parking & tolls	
Entertainment		Other travel (describe below)	
Meals		<u> </u>	
City Visited (for per diem)	# of days in city	City visited (for per diem)	# of days in city

Notes/Comments			
This is not an all inclusive organizer	. If there are additional items t	hat you believe to be pertinen	t to your specific
tax situation or if you have additior			
	, , ,		
8			
		Was a superior	