

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. Because 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.

In addition to completing the organizer, there are additional documents we'll need to complete your taxes. Below is a list of items we will need before we can prepare your taxes:

- Completed Organizer** (see below)
- Prior Years Asset Detail Schedule** - 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 included when you sent your prior year tax return to us, please send it now.
- Copies of Tax Forms** - Please make sure that any copies of 1099s, 1098s, or any other tax forms that are related to your rental property(ies) are included. ****PLEASE DO NOT SEND ORIGINALS****
- Additional Items** - 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. When your organizer is complete and you have compiled the above information, please return via one of three methods included in the instruction email.

Property A - Check the type of property	
Single family <input type="radio"/> Multi-family <input type="radio"/> Vacation/short-term <input type="radio"/> Land <input type="radio"/> Commercial <input type="radio"/> Self-Rental <input type="radio"/> Other (describe) _____	
Property Address _____ City _____ State _____ 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 <i>(complete wksht on page 4)</i>	
Association Dues/Fees	
Cleaning & Maintenance	
Commissions	
Insurance	
Improvements <i>(list on page 3)*</i>	
Legal & Professional	
Management Fees	
Interest <i>(Mortgage paid to banks)</i>	
Interest - Other	
Repairs <i>(list improvements on page 3)*</i>	
Supplies	
Taxes	
Tax Preparation Fees	
Utilities - Electric	
Utilities - Gas	
Utilities - Water/Sewer	
Utilities - Garbage	
Telephone, Cell, Internet	
Yard/Landscaping maintenance	
Other Expenses	

Property B - Check the type of property	
Single family <input type="radio"/> Multi-family <input type="radio"/> Vacation/short-term <input type="radio"/> Land <input type="radio"/> Commercial <input type="radio"/> Self-Rental <input type="radio"/> Other (describe) _____	
Property Address _____ City _____ State _____ 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 <i>(complete wksht on page 4)</i>	
Association Dues/Fees	
Cleaning & Maintenance	
Commissions	
Insurance	
Improvements <i>(list on page 3)*</i>	
Legal & Professional	
Management Fees	
Interest <i>(Mortgage paid to banks)</i>	
Interest - Other	
Repairs <i>(list improvements on page 3)*</i>	
Supplies	
Taxes	
Tax Preparation Fees	
Utilities - Electric	
Utilities - Gas	
Utilities - Water/Sewer	
Utilities - Garbage	
Telephone, Cell, Internet	
Yard/Landscaping maintenance	
Other Expenses	

*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 the type of property	
Single family <input type="radio"/> Multi-family <input type="radio"/> Vacation/short-term <input type="radio"/> Land <input type="radio"/> Commercial <input type="radio"/> Self-Rental <input type="radio"/> Other (describe) _____	
Property Address _____	
City _____ State _____ 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	

Property D - Check the type of property	
Single family <input type="radio"/> Multi-family <input type="radio"/> Vacation/short-term <input type="radio"/> Land <input type="radio"/> Commercial <input type="radio"/> Self-Rental <input type="radio"/> Other (describe) _____	
Property Address _____	
City _____ State _____ 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	

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Asset Depreciation Worksheet

- You must report the purchase and disposition of all assets you used in your rentals during the tax year
- For each asset bought or sold, provide the following information

Property A

Assets Purchased Listing				Assets Sold or Disposed Listing		
Description	Date Bought	Cost	Used/New?	Description	Disposition Date	Sale Price

Property B

Assets Purchased Listing				Assets Sold or Disposed Listing		
Description	Date Bought	Cost	Used/New?	Description	Disposition Date	Sale Price

Property C

Assets Purchased Listing				Assets Sold or Disposed Listing		
Description	Date Bought	Cost	Used/New?	Description	Disposition Date	Sale Price

Property D

Assets Purchased Listing				Assets Sold or Disposed Listing		
Description	Date Bought	Cost	Used/New?	Description	Disposition Date	Sale Price

Business Use of Automobile

Documentation must be kept to prove business use of vehicles

If you used your automobile for active conduct of your rental business, you can claim expenses for business use of your vehicle. You must have proof of business use in the form of a mileage log or a written calendar unless you can show your vehicle was 100% business use

You may be eligible to claim a standard mileage rate or claim actual operational expenses for your vehicle. In either case, you must maintain written records to support your deduction.

Vehicle 1

Purchase Price of vehicle	
Description (Model and Year)	Date vehicle was first used in your business
For this tax year only, enter the number of miles your vehicle was used for:	
Business Miles (not including commuting)	
Commuting Miles	
All other personal-use miles	
Interest paid on auto loan used to purchase this vehicle	
Was the vehicle available for personal use? Yes <input type="radio"/> No <input type="radio"/> Is another personal-use auto available? Yes <input type="radio"/> No <input type="radio"/>	
Do you have evidence to support this deduction? Yes <input type="radio"/> No <input type="radio"/> If "Yes", is the evidence written? Yes <input type="radio"/> No <input type="radio"/>	

Vehicle 1 Expenses (Provide these expenses if you are NOT claiming the standard mileage rate)

Garage Rent		Repairs	
Gas		Tires	
Insurance		Tolls	
Licenses		Registration Fees	
Oil		Other Expenses (list):	
Parking Fees			
Lease Payments			

Vehicle 2

Purchase Price of vehicle	
Description (Model and Year)	Date vehicle was first used in your business
For this tax year only, enter the number of miles your vehicle was used for:	
Business Miles (not including commuting)	
Commuting Miles	
All other personal-use miles	
Interest paid on auto loan used to purchase this vehicle	
Was the vehicle available for personal use? Yes <input type="radio"/> No <input type="radio"/> Is another personal-use auto available? Yes <input type="radio"/> No <input type="radio"/>	
Do you have evidence to support this deduction? Yes <input type="radio"/> No <input type="radio"/> If "Yes", is the evidence written? Yes <input type="radio"/> No <input type="radio"/>	

Vehicle 2 Expenses (Provide these expenses if you are NOT claiming the standard mileage rate)

Garage Rent		Repairs	
Gas		Tires	
Insurance		Tolls	
Licenses		Registration Fees	
Oil		Other Expenses (list):	
Parking Fees			
Lease Payments			

Travel Expense Worksheet

Airfare		Lodging	
Bus, train, taxi		Parking & tolls	
Entertainment		Other travel (describe below)	
Meals			
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 that you believe to be pertinent to your specific tax situation or if you have additional comments about any figures in the organizer, please make note below.