

Rental Property Information sheet

(this is only for rental properties)

Full Name: _____

Business Name rentals are under (if any): _____

Email Address: _____ Tax Year: _____

Section 1: Property Details (Complete for Each Rental Property)

1. Property Information:

- Property Address: _____
- Type of Property: () Single-Family () Multi-Family () Condo () Commercial () Other: _____
- Date Property Was Purchased: _____
- Date Property Was First Rented: _____
- Percentage of Personal Use (if any): _____%

2. Ownership Details:

- Ownership Type: () Individual () Partnership () LLC () Other: _____
- Your Ownership Percentage: _____%
- Co-Owner(s) Name(s) (if applicable): _____

3. Rental Activity:

- Was the property rented for the entire year? () Yes () No
 - If No, provide rental period: From _____ to _____
- Did you actively participate in managing the property? () Yes () No
- Number of Days Rented: _____
- Number of Days Used for Personal Use: _____

Section 2: Income

- Total Rental Income Received: \$ _____
- Other Income (e.g., late fees, pet fees, parking, laundry): \$ _____

Section 3: Expenses (Provide Amounts Paid for the Tax Year)

(Attach receipts or documentation as needed)

1. Operating Expenses:

- Advertising: \$ _____
- Property Management Fees: \$ _____
- Legal & Professional Fees: \$ _____
- Office Supplies (related to rental): \$ _____
- Travel Expenses (mileage, lodging, etc.): \$ _____
- Bank Fees: \$ _____
- HOA Fees: \$ _____

2. Utilities (if paid by you):

- Electricity: \$ _____
- Water/Sewer: \$ _____
- Gas: \$ _____
- Trash Removal: \$ _____
- Internet/Cable (if included in rent): \$ _____

3. Maintenance & Repairs:

- General Repairs: \$ _____
- Cleaning Services: \$ _____
- Landscaping/Snow Removal: \$ _____
- Pest Control: \$ _____
- Supplies (paint, tools, etc.): \$ _____

4. Insurance & Taxes:

- Property Insurance: \$ _____
- Real Estate Taxes: \$ _____
- Mortgage Interest (provide 1098 form): \$ _____
- Private Mortgage Insurance (PMI): \$ _____

5. Depreciation & Asset Purchases:

- **Did you purchase new assets (appliances, HVAC, roof, etc.)? () Yes () No**
 - If Yes, provide:
 - Description: _____
 - Date Purchased: _____
 - Cost: \$ _____

6. Other Expenses:

- Security System: \$ _____
 - License/Permit Fees: \$ _____
 - Miscellaneous (specify): _____ \$ _____
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Section 4: Mortgage & Loan Information (if applicable)

- Lender's Name: _____
 - Loan Start Date: _____
 - Principal Balance as of Jan 1: \$ _____
 - Principal Balance as of Dec 31: \$ _____
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Section 5: Additional Information

- Did you sell or dispose of any rental property during the tax year? () Yes () No
 - If Yes, provide settlement statements (HUD-1) and sale details.
 - Did you refinance any rental property during the year? () Yes () No
 - If Yes, attach the closing disclosure.
 - Were there any major renovations or improvements? () Yes () No
 - If Yes, list details with costs.
 - Did you receive any disaster relief payments related to the property? () Yes () No
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Section 6: Client Acknowledgment

I confirm that the information provided above is accurate to the best of my knowledge.

Client Signature: _____

Date: _____

Notes

Rental Property Tax Document Checklist

(we do not need this checklist. This is for your personal use)

Client Name: _____

Tax Year: _____

Personal & General Information:

- Completed Rental Property Tax Intake Form
 - Copy of last year's tax return (if new client)
 - Social Security Number or Tax ID (if not on file)
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Property-Specific Documents (for Each Rental Property):

- Closing disclosure or HUD-1 statement (for new properties or refinances)
 - Mortgage 1098 Form (shows mortgage interest paid)
 - Property tax statements
 - HOA statements (if applicable)
 - Lease agreements for current tenants
 - Proof of rental income (bank statements, rent ledger, or property management reports)
 - Details of property sale (if sold during the tax year)
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Income Documentation:

- Records of rental income (monthly or annual summary)
 - Documentation of other income (late fees, pet deposits, etc.)
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Expense Documentation:

- Property management statements (if using a management company)
- Advertising receipts (for tenant placement)

- Utility bills (if paid by you)
 - Insurance premium statements
 - Mortgage interest statements (Form 1098)
 - Repairs and maintenance receipts (itemized)
 - Invoices for contractors, landscapers, or service providers
 - Travel logs/mileage records (if you traveled for property management)
 - Office supply receipts (related to rental activity)
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 **Major Purchases & Improvements:**

- Receipts for appliances, furniture, HVAC systems, roofing, etc.
 - Date of purchase and installation for capital improvements
 - Documentation of any renovations or large repairs
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 **Loan & Financial Information:**

- Loan statements showing principal and interest paid
 - Refinance documents (if applicable)
 - Settlement statements for any property sales
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 **Other Important Documents:**

- 1099 forms (if you paid contractors \$600+ during the year)
- Disaster relief payment documentation (if applicable)
- Casualty or theft loss documentation (if applicable)
- Documentation for any property used for personal purposes

 **Additional Notes:**
