**RENTAL PROPERTY INCOME & EXPENSES**

(Need one for each rental property)

TAXPAYER NAME:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TAX YEAR: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

FULL PROPERTY ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Was property rental all year? Y N If no, how many days in the year rented: \_\_\_\_\_\_\_\_\_\_\_

Do you have a management company? Y N If yes, please ask for your annual statement

Is there a mortgage on the property? Y N If yes, please bring your 1098 Mortgage Statement

Annual total of rent paid (income): $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Expenses based on yearly amounts**

Advertising (if published “For Rent”) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Cleaning and Maintenance (Air B&B cleaner / Gardener / Pool Guy) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Commissions (Paid to realtors who get you a tenant) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Insurance $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Legal Fees / Professional Fees (for Evictions or contracts) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Management Fees $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Repairs $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supplies (printer ink / paper / things bought to manage property) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Utilities (gas, water, trash, sewer, power – paid by you) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Homeowners Association Fees (include penalties and dues) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Home Warranty $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Property Taxes (only if you pay them yourself) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Furniture (only if you rent as furnished – bought this year) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Travel (only if you live out of the state /country) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How many miles a year do you use your car to travel to your property \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_