

RENTAL WORKSHEET

FOR TAX YEAR _____

*****PLEASE FILL OUT A SEPARATE WORKSHEET FOR EACH RENTAL PROPERTY*****

PROPERTY ADDRESS:

STREET ADDRESS, CITY, STATE AND ZIP

TYPE OF PROPERTY: RESIDENTIAL MULTI UNIT COMMERCIAL LAND
 VACATION/SHORT TERM

FIRST YEAR OF RENTAL OR NEW CLIENT INFORMATION:

DATE PLACED IN SERVICE: _____

PURCHASE PRICE: _____

COST OF ADDITIONAL IMPROVEMENTS (PRIOR TO RENTING): _____

ARE YOU RENTING PART/ALL OF YOUR MAIN HOME? Y

IF YES, PLEASE PROVIDE:

TOTAL SQUARE FOOTAGE: _____

SQUARE FOOTAGE THAT IS EXCLUSIVELY RENTAL: _____

SHARED SQUARE FOOTAGE: _____

SQUARE FOOTAGE THAT IS EXCLUSIVELY PERSONAL: _____

OF DAYS AVAILABLE TO RENT: _____

DAYS RENTED: _____

DAYS EXCLUSIVELY PERSONAL USE: _____

FOR ALL PROPERTIES:

TOTAL # DAYS AVAILABLE FOR RENT: _____

TOTAL # DAYS RENTED: _____

TOTAL # DAYS PERSONAL USE: _____

INCOME

TOTAL RENT RECEIVED (INCLUDING ANY RENT REPORTED ON FORM 1099 MISC OR 1099 K)	\$
NON-REFUNDABLE DEPOSITS	\$
REFUNDABLE DEPOSITS COLLECTED	\$
REFUNDABLE DEPOSIT FORFEITED BY TENNANT	\$
RENT/DEPOSITS REFUNDED	\$
VALUE OF SERVICES OR PROPERTY IN LIEU OF RENT	\$

PLEASE COMPLETE AN AUTO WORKSHEET FOR ANY RENTAL MILEAGE

EXPENSES

ADVERTISING	\$
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RENTAL WORKSHEET

CLEANING	\$
YARD MAINTENANCE	\$
PROPERTY MANAGEMENT	\$
LEGAL AND PROFESSIONAL	\$
INSURANCE	\$
MORTGAGE INTEREST	\$
PROPERTY TAX	\$
UTILITIES	\$
REPAIR SUPPLIES	\$
REPAIRS CONTRACTED/LABOR 1099 ISSUED	
OTHER SUPPLIES (IF AIR B & B, MAY INCLUDE FOOD/TOILETRIES)	\$
HOA DUES	\$
OTHER INTEREST	\$
OTHER EXPENSES	\$

IMPROVEMENTS

(EXAMPLE: NEW ROOF, BATHROOM REMODEL) USE THE NEXT PAGE IF NEEDED

DESCRIPTION	DATE COMPLETED	COST
		\$
		\$
		\$

APPLIANCES/FURNITURE

DESCRIPTION	DATE PURCHASED	COST
		\$
		\$
		\$
		\$

TRAVEL

LOCATION:

NUMBER OF DAYS:

AIRFARE	\$
CAR RENTAL	\$
FUEL FOR CAR RENTAL	\$
BUS/TAXI/UBER	\$
HOTEL	\$
PARKING/TOLLS	\$

Other improvements or expenses: