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 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

RENTAL WORKSHEET

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	
CLEANING	
YARD MAINTENANCE	
PROPERTY MANAGEMENT	
LEGAL AND PROFESSIONAL	
INSURANCE	
MORTGAGE INTEREST provide 1098 form	
PROPERTY TAX	
UTILITIES	
REPAIR SUPPLIES	
REPAIRS LABOR 1099 ISSUED ☐	
OTHER SUPPLIES (IF AIR B AND 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

RENTAL WORKSHEET

LOCATION:
NUMBER OF DAYS:

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

Other improvements or expenses: