



**\*\*\*RENTAL ORGANIZER\*\*\***

Use for your residential or commercial rental property for your individual (Schedule E) or business (LLC, S Corp or partnership) tax returns

Property owner name: \_\_\_\_\_ EIN or SSN: \_\_\_\_\_

Property location and address: \_\_\_\_\_ Tax year: \_\_\_\_\_

**Indicate Property Type:**

Single Family Residential

Multi-Family Residential

Vacation/Short-Term

Commercial

Land

**Indicate Property Ownership:**

Taxpayer       Spouse       Joint

Partnership or LLC       S Corporation

**Issuance of 1099 to Service Providers:**

Pay \$600 or more to service provider?

Did you give 1099 to non-incorporated providers?

100 % business

or  \_\_\_\_\_ % business

Were you actively involved in the management of the rental activity of this property?  No  Yes

Is the owner(s) a real estate professional?  No  Yes  Unsure if I qualify, please discuss with us

**To be a real estate professional, more than half of your work time must be in the profession and you must work more than 750 hours in a real property trade or business as a self-employed individual or as the owner of a business entity.**

Was this property used during the year for personal purposes by the owner or owner's family, or by the owner's business?  No  Yes

If used for personal purposes - indicate number of days used personally: \_\_\_\_\_ & indicate number of days rented: \_\_\_\_\_

Rental Income (net of sales tax collected, if applicable) \$ \_\_\_\_\_

**Expenses**

Advertising	\$	_____
Automobile & travel	\$	_____
Cleaning and maintenance	\$	_____
Commissions	\$	_____
Insurance	\$	_____
Accounting & tax preparation	\$	_____
Legal & other professional	\$	_____
Management fees	\$	_____
Mortgage interest paid to banks (Form 1098)	\$	_____
Other interest	\$	_____
Repairs	\$	_____
Supplies	\$	_____
Taxes - real estate	\$	_____
Taxes - other	\$	_____
Utilities	\$	_____
Association dues (regular, non-capital)	\$	_____
Other expenses (list):		
_____	\$	_____
_____	\$	_____
_____	\$	_____
_____	\$	_____
_____	\$	_____

Provide a copy of the closing statement & a list of all the improvements made to the property after you purchased it if

you acquired a rental property during the year or

you converted a property to rental use during the year.

Date Placed in service: \_\_\_\_\_ (available for rent)

**RENTAL PROPERTY IMPROVEMENTS**

If you spend money on improvements to an existing rental property during the year, provide details below:

Description	Date	Cost
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

DEPRECIATION: provide depreciation schedules from the prior year if we did not prepare your return for that year.

If you sold any rental properties during the year, provide copies of the closing statements from the sale of and from the purchase of the property and a detailed list of all improvements made to the property during your ownership.