

Please complete all applicable sections and upload supporting documents. If you have more than two properties, submit additional sheets as needed.

SECTION 1 - BASIC INFORMATION

RENTAL PROPERTY #1

RENTAL PROPERTY #2

Rental Property Address (Address, City, State, Zip Code, Country)		
LLC Name & EIN (if any)		
Type of property (Single family, Multi-family, Vacation, Land, etc.)		
Number of days used for personal use during the tax year		
Total days rented at fair market value during the year		

SECTION 2 - INCOME INFORMATION *(Please upload all 1099 Forms and any additional documents showing income received during the year)*

Form 1099-MISC	# of forms received		
	Enter the total for all forms received \$		
Form 1099-K	# of forms received		
	Enter the total for all forms received \$		
All other payments received that were not reported on Forms 1099 \$			

SECTION 3 - EXPENSES

RENTAL PROPERTY #1

RENTAL PROPERTY #2

All expenses reported must have supporting documents or records, and must be provided upon request.

Advertising		
Commissions		
Management Fees		
Legal Fees		
Cleaning & Maintenance		
Repairs		
Supplies		
Property Insurance		
Real Estate Taxes		
Utilities (if any paid by you)		
Mortgage Interest (upload Form 1098)		
Home Owners Association Fee		
Rental License & Permits		
Tax Preparation Fees		

If you incurred other expenses, provide the expense description and amount in the additional comments section or upload a document with the expense details.

SECTION 4 - DEPRECIATION DETAILS

RENTAL PROPERTY #1

RENTAL PROPERTY #2

Original purchase price of property		
Land Value at the time of purchase		
Property Purchase Date (mm/dd/yyyy)		
Rental Start Date (mm/dd/yyyy)		
Accumulated Depreciation (only new clients - check prior year return)		

SECTION 5 - VEHICLE EXPENSE		RENTAL PROPERTY #1		RENTAL PROPERTY #2	
Date Vehicle was first used for business (mm/dd/yyyy)					
Year, Make and Model of the Vehicle					
Report your mileage for the tax year					
Business miles (driven to rental business only)					
Commuting miles (to & from regular work site)					
Personal miles (not related to work)					
Do you have another vehicle available for personal use?	Yes	No	Yes	No	
Was your vehicle available for use during off-duty hours?	Yes	No	Yes	No	
Do you have evidence to support your vehicle deductions?	Yes	No	Yes	No	
If yes to above question, is the evidence in writing?	Yes	No	Yes	No	
Actual Expenses					
If you choose to use actual vehicle expenses instead of mileage, upload a document listing each vehicle expense, the business-use percentage (if applicable), and the amount paid. You are responsible for maintaining supporting documentation for your tax records.					

SECTION 6 - SALE OF RENTAL PROPERTY		RENTAL PROPERTY #1		RENTAL PROPERTY #2	
Property purchase date (mm/dd/yyyy)					
Original Purchase price					
Sale Date (mm/dd/yyyy)					
Sale Amount					
Sale related expenses (List each type of expense and the amount)					
Commission Paid					
Closing Cost (do not include expenses listed under sale related expenses)					
Any other expenses incurred during purchase/sale of the property					
Improvements expenses that resulted in increasing the property value					
Did you purchase like-kind property within 6 months? Provide details.					
New property description					
New property purchase date (mm/dd/yyyy)					
New property purchase amount					

SECTION 7 - ADDITIONAL COMMENTS	

By entering your name below, you acknowledge that the information you have provided is true and correct to the best of your knowledge and belief, and that you have related receipts and documentation to retain with your tax records.

First Name: Last Name: Date: