

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
<i>All expenses reported must have supporting documents or records, and must be provided upon request.</i>			
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)	Yes	No	Yes	No
Commuting miles (to & from regular work site)	Yes	No	Yes	No
Personal miles (not related to work)	Yes	No	Yes	No
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: