

Rental Property Worksheet



Certified Public Accountants

Name: _____

Rental Property #1 – Address _____

If Purchased this Year – Date _____ Initial Cost _____ Land _____ Improvements _____

Rental Property #2 – Address _____

If Purchased this Year – Date _____ Initial Cost _____ Land _____ Improvements _____

Rental Property #3 – Address _____

If Purchased this Year – Date _____ Initial Cost _____ Land _____ Improvements _____

	Rental #1	Rental #2	Rental #3
Rents Received (# Days Rented _____)	\$ _____	\$ _____	\$ _____
Advertising	\$ _____	\$ _____	\$ _____
Cleaning and Maintenance	\$ _____	\$ _____	\$ _____
Commissions	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____
Legal/Professional Fees	\$ _____	\$ _____	\$ _____
Management Fees	\$ _____	\$ _____	\$ _____
Mortgage Interest	\$ _____	\$ _____	\$ _____
Other Interest	\$ _____	\$ _____	\$ _____
Repairs	\$ _____	\$ _____	\$ _____
Supplies	\$ _____	\$ _____	\$ _____
Taxes	\$ _____	\$ _____	\$ _____
Utilities	\$ _____	\$ _____	\$ _____
Travel	\$ _____	\$ _____	\$ _____
Labor	\$ _____	\$ _____	\$ _____
Other _____	\$ _____	\$ _____	\$ _____

Question MUST be answered >> Do you have “evidence” to support your mileage? Yes No
and this if applicable >> If yes, is the “evidence” written? Yes No

“Evidence” includes mileage logs, appointment records, calendars, etc. plus IRS could ask for odometer readings from oil changes, repair invoices, purchase and sale documents.

Business use of the home:

Total Sq Ft of Home: _____

Business Sq Ft of Home: _____

Home Mortgage Interest: \$ _____

Property taxes: \$ _____

Insurance: \$ _____

Rent: \$ _____

Repairs & Maintenance: \$ _____

Utilities: \$ _____

Required Information:

1) Do you have a separate EIN for this rental? Y N
 If yes, what is your EIN? _____

2) What is your Registered Name? _____

3) Did you send all required forms 1099? Y N

4) Please provide a copy of the closing statement if any properties are purchased or sold during the year.

Rental Property Worksheet

Assets Sold	Asset # (from depr sched)	Date Sold	Sale Price	Date Bought	Cost

Record of Fixed Assets Purchased This Year					
Asset Purchased	Cost	Date Bought	Item traded in	Date/Year traded item purchased	Amount pd to boot

Odometer Reading of Vehicles Used in Business			
Description of Vehicle	Business Miles Percentage	1-Jan	31-Dec
1)			
2)			
3)			

Business Vehicle Expense						
	Vehicle 1	BU %	Vehicle 2	BU %	Vehicle 3	BU %
Interest						
Insurance						
License Plates						
Fuel						
Repairs/Maintenance						
Total cost						