

# 2023 RENTAL Taxpayer Organizer

## Rental Property Tax Organizer

### Rental Income and Expenses

Indicate type of property as 1 - Single Family Residence, 2 - Multi-Family Residence, 3 - Vacation/Short-Term Rental, 4 - Commercial, 5 - Land, 6 - Self-Rental, or 7 - Other (describe).

	<i>Property A</i>		<i>Property B</i>		<i>Property C</i>	
	Address of property:		Address of property:		Address of property:	
	Type		Type		Type	
	Any personal use? Yes No		Any personal use? Yes No		Any personal use? Yes No	
	<i>Fair Rental Days</i>	<i>Personal Use Days</i>	<i>Fair Rental Days</i>	<i>Personal Use Days</i>	<i>Fair Rental Days</i>	<i>Personal Use Days</i>
Date placed in service						
Rents received	\$		\$		\$	
<b>Expenses</b>						
Advertising	\$		\$		\$	
Auto and travel	\$		\$		\$	
Cleaning and maintenance	\$		\$		\$	
Commissions	\$		\$		\$	
Insurance	\$		\$		\$	
Legal and professional fees	\$		\$		\$	
Management fees	\$		\$		\$	
Mortgage interest paid to banks	\$		\$		\$	
Other interest	\$		\$		\$	
Repairs	\$		\$		\$	
Supplies	\$		\$		\$	
Taxes	\$		\$		\$	
Utilities	\$		\$		\$	
Other (list)	\$		\$		\$	
	\$		\$		\$	
	\$		\$		\$	
	\$		\$		\$	

### Property Information

If this is your first year with our firm, please provide a depreciation schedule for all property placed in service before 2023.

**Property Purchased.** Treat the cost of improvements made to real property as the purchase of a new asset.

<i>Asset</i>	<i>Date purchased</i>	<i>Cost</i>	<i>Date placed in service</i>
		\$	
		\$	
		\$	
		\$	

### Property Sold or Taken Out of Service

<i>Asset</i>	<i>Date sold or taken out of service</i>	<i>Selling price</i>	<i>Trade in?</i>
		\$	
		\$	
		\$	
		\$	
		\$	