

Rental Worksheet

Name: _____

Address: _____

City/State/Zip: _____

Type: Choose One

_____ Single family residence _____ Commercial Total rental days: _____ Full year _____ Partial year

_____ Multi-family residence _____ Land If partial - # of days: _____

_____ Vacation/short-term** _____ Self-rental ** If vacation rental: how many days of personal use during the year? _____

Rental Income \$ _____

Expenses:

Advertising \$ _____

Telephone \$ _____

Association dues \$ _____

Utilities \$ _____

Auto expense: Use **Auto Expense Worksheet**

Other: _____ \$ _____

Cleaning \$ _____

Other: _____ \$ _____

Commissions paid \$ _____

Other: _____ \$ _____

Gardening \$ _____

Depreciation of Building

Insurance \$ _____

Is this the first year for this rental? Y N

Legal/professional \$ _____

If yes:

Management fees \$ _____

____ Purchased this year; provide closing docs

Mortgage interest: Provide Form 1098

____ Previous primary residence: provide basis*

Painting/Decorating \$ _____

* cost of home plus any improvements

Pest control \$ _____

Real estate taxes \$ _____

If no (new clients only):

Repairs & Maintenance \$ _____

Provide previous depreciation schedule

Supplies \$ _____

IMPORTANT: The following items **MUST** be depreciated and should **NOT** be included in the above categories. Use our Depreciation Worksheet to list out these items.

Computers

Printer

Furniture

Equipment

Large Improvements

Monitors

Telephones

Machinery

Large Repairs

Appliances

Questions?

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