



RENTAL PROPERTY TAX PREPARATION CHECKLIST

General Information

- Copy of your previous tax return (for new clients only)
- Owners' name _____
- Type of ownership _____
- Property address _____

Rental Income

- Your rental income _____

Rental Expenses

- | | |
|---|--|
| <input type="checkbox"/> Personal use percentage _____ | <input type="checkbox"/> Property taxes _____ |
| <input type="checkbox"/> Advertisement _____ | <input type="checkbox"/> Motor vehicle expense _____ |
| <input type="checkbox"/> Insurance _____ | <input type="checkbox"/> Other expense _____ |
| <input type="checkbox"/> Interest _____ | |
| <input type="checkbox"/> Office expense _____ | |
| <input type="checkbox"/> Professional fees _____ | |
| <input type="checkbox"/> Management & admin fees _____ | |
| <input type="checkbox"/> Maintenance and repairs _____ | |
| <input type="checkbox"/> Salaries, wages, and benefits _____ | |
| <input type="checkbox"/> Travel _____ | |
| <input type="checkbox"/> Telephone and utilities _____ | |