
RENTAL PROPERTY TAX PREPARATION CHECKLIST

Name
Phone
Email

General Information

Copy of your previous tax return (for new clients only)

Date of purchase of the rental property that's for sale

Original purchase price of the rental property that's for sale

Type of ownership

Property address

Rental Income

Annual income \$

Annual Rental Expenses

Personal use percentage

%

Property taxes

Advertisement \$

Utilities \$

Insurance \$

Vehicle expense \$

Interest and Bank charge \$

Office expense \$

Professional fees(Lawyer/Accountant)
\$

Other expense \$

Management & admin fees \$

Maintenance & repairs \$

Capital Cost \$