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## **RENTAL PROPERTY TAX PREPARATION CHECKLIST**

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**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**

<b>Personal use percentage</b>	<b>%</b>	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 \$		