

# Rental Property Worksheet

(Current Year \_\_\_\_\_)

## General Information

Owner(s) Name: (include all) \_\_\_\_\_

Property Address: street \_\_\_\_\_

city \_\_\_\_\_ prov/state \_\_\_\_\_ post/zip \_\_\_\_\_ country \_\_\_\_\_

1. Is this the first year this property was available for rent? \_\_\_\_\_  
If yes, please provide the purchase documents for the property or an appraisal/valuation for the date placed into service.
2. Is the property is a short-term rental (average rental period of 7 days or less?) \_\_\_\_\_
3. Do you offer additional services (meals, laundry, cleaning, etc.)? \_\_\_\_\_ If yes, please explain: \_\_\_\_\_  
\_\_\_\_\_
4. Is your tenant(s) a friend/family member? \_\_\_\_\_
5. Is the amount of rent charged normal for the area? \_\_\_\_\_  
If not, please explain: \_\_\_\_\_
6. Were there any days the property could not be occupied by a tenant? \_\_\_\_\_ If yes, how many days and why?  
\_\_\_\_\_
7. How many days did you occupy the property yourself (if applicable) \_\_\_\_\_
8. Was the property sold in the year? \_\_\_\_\_ If yes, please provide all sale documents.
9. Did you receive or issue any Forms 1099-MISC, 1099K, etc.? \_\_\_\_\_ If yes, please provide.
10. Did you receive a Form 1098 for your mortgage? \_\_\_\_\_ If yes, please provide.
11. Do you have travel expenses to claim? \_\_\_\_\_ If yes, please complete our [Vehicle Expense Worksheet](#)

## Income

CURRENCY _____	<u>Current Year</u>	<u>Prior Year</u> <u>(if needed)</u>
Gross Rents Received		
Other Income (describe)		
Other Income (describe)		
Other Income (describe)		
Deposit (used up)		



**Expenses**

**Current Year**

**Prior Year  
(if needed)**

Advertising		
Cleaning and Maintenance		
Commissions		
Insurance		
Legal/Professional Fees		
Management Fees		
Mortgage Interest		
Other Interest		
Repairs		
Supplies		
Taxes		
Utilities		
Other (describe)		
Other (describe)		
Other (describe)		

**Assets**

<b><u>Description of Asset</u></b>	<b><u>Start Date</u></b>	<b><u>Value 01/01</u></b>	<b><u>Value 12/31</u></b>	<b><u>Cost/Value when placed in Service</u></b>	<b><u>Date sold/removed from Service</u></b>
Building					
Land					
Bank Account					
Bank Account					
Fridge					
Stove					
Dishwasher					



<u>Description of Asset</u>	<u>Start Date</u>	<u>Value 01/01</u>	<u>Value 12/31</u>	<u>Cost/Value when placed in Service</u>	<u>Date sold/removed from Service</u>
Washing Machine					
Dryer					
Deposit (holding)					
Other (Describe)					
Other (Describe)					
Other (Describe)					
Other (Describe)					

**Liabilities**

	<u>Start Date</u>	<u>Amount Owning 01/01</u>	<u>Amount Owning 12/31</u>
Mortgage			
Credit Card			
Other (Describe)			
Deposit Interest Payable			

**Additional Information:**

---



---



---



---



---



---



---



---



---



---



---