



Rental Property Checklist Documents Required

Please provide the following documentation when delivering your tax information to us for preparing your rental income tax return. You should receive this information prior to the 31st of January.

Also, please provide any additional documentation so that we may accurately include all taxable events you have incurred throughout the year. If you are uncertain, please provide the information and we will determine the tax impact.

Rental Income:

- Copy of all monthly bank statements pertaining to rental property
- Copy of lease(s) and/or rental contract(s)
- Summary of all rental income (excluding security deposit)
- 1099 Miscellaneous Rental Income

Rental Expenses:

- Travel related expense summary
 - Mileage Log
 - Air, hotel, etc.
- Rental Template
- Taxes Paid
- Mortgage Interest

Depreciation:

- Copy of HUD Closing Settlement Statement (purchase and sale)
- Copy of previous depreciation schedules
- Summary of all improvements made to property (including receipts)
- Copy of most recent tax assessment of property