

Rental Property Checklist

Please provide the following documentation when delivering your tax information to us for preparing your rental income tax return.

If you have multiple rental properties, please provide a breakdown for each property separately.

It is important to keep detailed records and receipts for all expenses related to your rental properties.

To help track rental income and expenses, please refer to our Rental Property Income & Expense Worksheet.



GENERAL INFORMATION:

- ☐ Copy of Lease(s) and/or Rental Contract(s)



RENTAL INCOME:

- ☐ Summary of Income (Excluding Security Deposit)
- ☐ 1099 Miscellaneous Rental Income



RENTAL EXPENSES:

- ☐ Property related (Maintenance, Utilities, Etc.)
- ☐ 1098 Mortgage Interest
- ☐ Taxes Paid
- ☐ Vehicle Mileage Log
- ☐ Repairs
- ☐ Travel
- ☐ Airfare
- ☐ Hotel
- ☐ Auto Rental
- ☐ Management Fees



DEPRECIATION:

- ☐ Purchases, Refinance, or Sale of Property
- ☐ Copy of HUD Closing Settlement Statement (Purchase, Refinance, and Sale)
- ☐ Copy of Previous Depreciation Schedules (New Clients Only)
- ☐ Summary of All Capital Improvements Made to Property
- ☐ Copy of 1099-S Sale/Disposition of Real Estate