



RENTAL PROPERTY WORKSHEET

RENTAL PROPERTY ADDRESS *(Fill out one sheet for each rental property — Do not combine)*

Address	City	State	Zip
Date Rental Started <i>(If new)</i>	Property Type	<input type="checkbox"/> Single Fam <input type="checkbox"/> Duplex <input type="checkbox"/> Apt Bldg <input type="checkbox"/> Land <input type="checkbox"/> Commercial <input type="checkbox"/> Room Rental <input type="checkbox"/> Other	

RENTAL INCOME

AMOUNT

Total Rents Received *(Do not include refundable deposits)*

EXPENSES

AMOUNT

Advertising & Promotions *(Advertising for rental property)*

Business Miles Driven *(Miles driven for rental business)*

Cleaning and Maintenance *(Any cleaning or maintenance costs)*

Commissions *(Paid to rental agencies, etc.)*

Insurance *(PMI, liability and/or umbrella policies)*

Legal and Accounting

Management Fees *(Paid for management by someone else)*

Interest - Mortgage *(Bring Form 1098)*

Interest - Other *(Credit cards/other loans just for rental)*

Repairs *(Repairs to rental property)*

Supplies *(General supplies for rental property)*

Taxes *(Property taxes)*

Utilities *(Paid by you for rental property)*

Association Dues

Rental License Fees

Bank Charges *(Bounced check fees, etc.)*

Appliances *(Use Equipment Worksheet to list multiple items)*

Improvements *(Major improvements - Use Equipment Worksheet to list multiple items)*

Furnishings *(Use Equipment Worksheet to list multiple items)*

TOTAL EXPENSES

NET INCOME

- Bring Settlement Statement/Closing Disclosure for any purchase, sale or refinance
- Fill out one of these pages for **EACH RENTAL PROPERTY**
- If converting property to rental, we need Fair Market Value of property at time of conversion as well as your cost of buying and improving property

AIRBNB, VRBO & SHORT TERM RENTAL

How many days was property rented during the year?	
Sales Tax Collected/Paid	
Fees Paid to Online Services	
Was average stay of guests 7 days or less?	<input type="checkbox"/> Yes <input type="checkbox"/> No

