

If more than 4 properties, please complete additional sheets as needed.

	<u>Property 1</u>	<u>Property 2</u>	<u>Property 3</u>	<u>Property 4</u>
Property Address:				
Property Owner(s):				
Purchased in 2025? <i>If yes, please provide closing documents.</i>				
If purchased in 2025, rental start date: <i>Please provide a separate list of any expenses incurred prior to renting.</i>				
Sold in 2025? <i>If yes, please provide closing documents.</i>				

For New Clients Only

Has this property been depreciated? <i>If yes, please provide prior year depreciation schedule (not always included in prior year tax return).</i>				
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For Current Tax Year

Days Rented:				
Days of Personal Use:				
Any 1099 Forms Received? <i>If yes, please provide.</i>				

Please list the annual totals for each category below.

Rental Income:				
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Expenses

Advertising:				
Auto:				
Travel:				
Cleaning & Maintenance: <i>(Lawn Care, Snow Removal, etc.)</i>				
Insurance:				
Legal & Professional Fees:				
Management Fees:				

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	<u>Property 1</u>	<u>Property 2</u>	<u>Property 3</u>	<u>Property 4</u>
<i>Please provide copies of all 1098 forms (Mortgage Interest Statement).</i>				
Mortgage Interest: <i>NOT Listed on 1098 Form</i>				
Mortgage Insurance: <i>NOT Listed on 1098 Form</i>				
Real Estate Taxes: <i>NOT Listed on 1098 Form</i>				
<i>If major repairs or improvements were completed, please provide further details/documentation.</i>				
Repairs:				
Supplies:				
Utilities: <i>(Electric, Water, Trash, etc.)</i>				
Other: _____				