

Tax Organizer for Landlords

If you own a rental property, the following is a list of information that will be required in order to prepare your taxes.

1. Property Type
 - Single Family Residential
 - Multi-Family Residential
 - Vacation Property
 - Commercial
 - Land
 - Other
2. Property Location
3. Percentage of Ownership
4. Days During the Year Rented
5. Days Used for Personal Use
6. Are you a licensed Real Estate Professional?
7. Was the property owner-occupied during any of the rental period?
8. What percentage of the property was owner-occupied?
9. Was the property owned by you or spouse for the entire year?
10. What year was the property purchased?
11. What year was the property first rented by you?
12. Has the property been fully disposed of in the current year?
13. The following amounts / receipts should be collected prior to our meeting:
 - Rental Income Received
 - Rental Income Received from 1099-MISC
 - Other Rental / Royalty Income Received
 - Advertising Expenses
 - Property Cleaning and Maintenance Expenses
 - Qualified Mortgage Insurance Paid
 - Primary Mortgage Interest Paid
 - 2nd Mortgage
 - Equity Line Secured by Property
 - Property Real Estate Taxes Paid
 - Other Taxes Paid
 - Property Repairs
 - Property Supplies
 - Utilities Paid
 - List of Major Expenditures / Improvements / Renovations Made to Property During Year
(Include Date of Purchase)

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