

Client Name _____

Tax Organizer

Rental Real Estate Activity

****This document provides space to report 3 rental properties.**

If you have more than 3 rentals, please duplicate this form for each additional rental.

Type of Rental:

- Single family residence
- Multi-family residence
- Commercial

Full address of rental property: _____

Percentage of Ownership: _____

Income: \$ _____ Days Rented _____

Advertising		Qualified Mortgage Insurance	
Association Dues		Landscaping	
Auto & Travel		Security	
Cleaning & Maintenance		Painting & Decorating	
Commissions		Pest Control	
Lawncare		Repairs (small)	
Insurance		Supplies	
Legal & Professional Fees		Taxes—Real Estate	
Licenses & Permits		Telephone	
Management Fees		Utilities	
Improvements (large)		Plumbing & Electrical	
Mortgage Interest (provide your 1098)		Other: _____	

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- Single family residence
- Multi-family residence
- Commercial

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Percentage of Ownership: _____

Income: \$ _____ Days Rented _____

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Association Dues		Landscaping	
Auto & Travel		Security	
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Insurance		Supplies	
Legal & Professional Fees		Taxes—Real Estate	
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Do you have a property manager?

- Yes—please provide annual reports
- No

Did you purchase or sell any rental real estate last year?

- Yes—upload or drop off Closing Disclosures and 1099-S
- No