

## 2015 Tax Organizer and Questionnaire for *Rental Income and Expenses*

The following information is required to prepare your Rental Income return. The information can be filled out and submitted to us with any requested documents attached. Upon receipt we will review the information and contact you with any questions.

If we did not prepare your previous tax return, please provide copies of the last three (3) years' tax returns including **depreciation schedules**.

For each Rental Real Estate Property, list the location and Type of property [Single Family, Multi-family, Vacation, Commercial, Land, Self-rental, Other (describe)].

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

For each question indicate 'yes' or 'no'. For each 'yes' response please use the box to note which property (i.e., 1, 2, 3, etc.)

	PROPERTY #	1	2	3
<b>Y N</b> Were any of these properties purchased/converted to a rental in 2015?				
<b>Y N</b> Were any of these properties sold in 2015?				
If 'yes' to either of the above questions, attach the closing statements (HUD-1).				
<b>Y N</b> Do you materially participate in these rental properties?				
<b>Y N</b> Did you use any property for personal purposes for more than 14 days?				
<b>Y N</b> Is the property rented to a relative?				
<b>Y N</b> Is the property rented for at least Fair Market Value?				

Please, provide information applicable for each property. If you have more than three properties, please ask for additional schedules.

	Property #1	Property #2	Property #3
<i>Rents Received</i>	_____	_____	_____
<i>Expenses for: Advertising</i>	_____	_____	_____
Association Dues	_____	_____	_____
Cleaning and Maintenance	_____	_____	_____
Commissions/Management fees	_____	_____	_____
Insurance	_____	_____	_____
Labor	_____	_____	_____
Landscaping	_____	_____	_____
Legal and Professional fees	_____	_____	_____
Mortgage Interest	_____	_____	_____
Other Interest	_____	_____	_____
Property Taxes	_____	_____	_____
Repairs	_____	_____	_____
Supplies	_____	_____	_____
Telephone	_____	_____	_____
Travel	_____	_____	_____
Utilities	_____	_____	_____

*continued on reverse side*

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**Y N** Do you have any vehicle expenses related to these rental properties?

If 'yes' please provide the following for each vehicle:

Year/Make/Model of vehicle \_\_\_\_\_ Date placed in Service \_\_\_\_\_  
 Business Miles driven in 2015 \_\_\_\_\_ Cost of Vehicle \_\_\_\_\_  
 Total Miles driven in 2015 \_\_\_\_\_ Parking fees/Toll fees \_\_\_\_\_

If claiming **actual** expenses vs. **standard** mileage please provide: Cost of Repairs \_\_\_\_\_;  
 Gas and oil expenses \_\_\_\_\_; Auto insurance \_\_\_\_\_; and Auto loan interest \_\_\_\_\_.

**Y N** Did you purchase any depreciable assets for the property?

If yes, provide the following information:

Description of Asset	Cost	Date	Property #	New/Used/Converted

**Y N** Were any assets sold or disposed of during 2015?

If so please provide the following information:

Description of Asset	Date Acquired	Date Sold	Sale Price	Cost or Basis	Property #

**Y N** Did you have any major repairs, upgrades, or improvements to the property?

If yes, provide the following information:

Description of Repair/Improvement	Cost	Date	Property #

If there are any expenses you incurred which are not listed above please, provide that information:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

\_\_\_\_\_  
 Print Name

\_\_\_\_\_  
 Signature

\_\_\_\_\_  
 Date