

Rental Property

Complete separately for each rental property.

Client name:

Tax year:

01 | Property and ownership

Property address/type, owners and percentages, acquisition date, and whether held personally or through an entity. Do not enter account numbers.

02 | Rental dates and use

Date ready and available to rent, days rented, days of personal/family use, vacant periods, and below-market arrangements.

03 | Rental income

Rent collected, advance rent, deposits retained/returned, tenant-paid expenses, reimbursements, platform payouts, and information returns.

04 | Operating costs

Give advertising, management, commissions, cleaning, insurance, mortgage interest, taxes, utilities, supplies, legal/accounting, and other costs with records.

05 | Repairs versus improvements

Describe each major project, what changed, cost, dates, and when ready for use. Separate routine repairs from additions or replacements for review.

06 | Basis and land allocation

Provide purchase/closing statements, land/building allocation, conversion-from-personal-use records, acquisition costs, and prior basis adjustments.

Answer every item. Write None or Not sure when needed. Add a page for extra people/assets.

Save and reopen to check answers. Return only through your own preparer's secure portal.

This questionnaire is not an e-file authorization, tax election, or determination of eligibility.

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07 | Assets and depreciation

Furniture, appliances, equipment, building improvements: cost, first rental-use date, business-use percentage, and previous depreciation schedules.

08 | Your participation

What work did you do and approximately how much time? Did a manager handle it? Any related real-estate work or co-owner services?

09 | Travel and mixed-use expenses

Any mileage, travel, shared expenses, or use of part of your home? Explain business purpose and allocation; provide logs and records.

10 | Losses and carryovers

Prior rental returns, suspended losses, passive-loss records, ownership changes, and carryovers available?

11 | Sale or major change

Any sale, exchange, refinancing, casualty, insurance proceeds, foreclosure, or conversion to/from personal use? Give dates and documents.

12 | Missing items and questions

List missing records, other rental properties, and questions. Your preparer will review reporting and deduction treatment.

Answer every item. Write None or Not sure when needed. Add a page for extra people/assets.

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