

# RENTAL INCOME FORM

LAST NAME \_\_\_\_\_

FIRST NAME \_\_\_\_\_

MIDDLE \_\_\_\_\_

**PLEASE USE THIS FORM TO TELL US ABOUT YOUR RENTAL HOME OR SECOND HOME**

We will use all the information you provide to claim any possible tax deductions related to the ownership, maintenance and the rental income or loss related to the ownership of a second home or rental property.

**PROPERTY TYPE?**  Single-Family House |  Multi-Family Unit |  Vacation Home |  Other

**PLEASE PROVIDE YOUR RENTAL INCOME OR VACATION PROPERTY ADDRESS**

STREET ADDRESS \_\_\_\_\_

SUITE # /APT # \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_

ZIP CODE \_\_\_\_\_

**IF THIS IS A FOREIGN ADDRESS, PLEASE PROVIDE THE FOLLOWING DETAILS:**

FOREIGN PROVINCE/STATE \_\_\_\_\_

FOREIGN COUNTRY \_\_\_\_\_

FOREIGN POSTAL CODE \_\_\_\_\_

## INCOME BEFORE EXPENSES

**HOW IS YOUR INCOME REPORTED?**  Rental Income is Self-Reported |  Rental Income is Reported by 1099

TOTAL RENTAL INCOME RECEIVED LAST YEAR \$ \_\_\_\_\_ (BEFORE EXPENSES)

## EXPENSES

**THIS LIST PROVIDES A SAMPLE LIST OF THE MOST COMMON EXPENSES RELATED TO RENTAL PROPERTIES. YOU ARE NOT LIMITED TO THE ITEMS ON THIS LIST, BUT IT IS REQUIRED BY THE IRS THAT YOU MAINTAIN PROPER RECEIPTS.**

ADVERTISING FEES PAID (TO ATTRACT RENTERS) .....	\$ _____
CLEANING & MAINTENANCE COSTS .....	\$ _____
MANAGEMENT FEES PAID TO PROPERTY MANAGEMENT	\$ _____
COMMISSIONS .....	\$ _____
MORTGAGE INTEREST QUALIFIED (FORM 1098-INT) .....	\$ _____
REPAIRS MADE ON PREMISE .....	\$ _____
REAL ESTATE TAXES PAID .....	\$ _____
UTILITIES .....	\$ _____
DEPRECIATION .....	\$ _____
OTHER EXPENSES .....	\$ _____

## DAYS OF PERSONAL USE VS. BUSINESS USE

**IF YOU HAVE USED THE ABOVE-REFERENCED PROPERTY FOR PERSONAL OR OWNER USE, PLEASE TELL US...**

TOTAL DAYS LAST YEAR YOUR PROPERTY WAS USED FOR PERSONAL USE: \_\_\_\_\_ DAYS

TOTAL DAYS LAST YEAR YOUR PROPERTY WAS USED FOR BUSINESS USE: \_\_\_\_\_ DAYS