

Rental Income & Expense Worksheet

For Tax Year 20_____

Please use a separate worksheet for each rental unit.

Address of property:_____ Please circle type of rental: **House** Condo Multi-Unit

If vacation property, was it owner occupied any part of the year? If so, how many days/months?_____

If Multi-Unit: # of Units_____ Is the building owner occupied? If so, what %?_____

***For Capital Improvements (New Roof, Appliances, Carpeting, Tuckpointing, etc.)
please list separately on Capital Improvements Worksheet**

***If rental purchased and/or sold in current year, please provide a copy of the closing statement(s).**

New clients: *If this is the first time having Taxlink prepare your return, please provide a copy of at least 2 years prior returns.

How much did you receive in Rental Income? _____

	Total
Expenses	
Advertising	
Auto & Travel	
Cleaning/Maintenance	
Commissions	
Insurance	
Legal/Professional Fees	
Management Fees/Association Fees	
Mortgage Interest	
Other Interest	
Repairs (Plumbing, Sewer, Heating, AC, etc.)	
Supplies	
Taxes - Real Estate and Other	
Utilities (Gas, Sewage, Electric, Water, Cable)	
Miscellaneous - Please List (Trash Removal, Landscaping, etc.)	

Expense worksheets and tax organizer are provided as an aid to gather information pertinent to preparing your tax return. The expenses listed on these worksheets may or may not be all inclusive of your specific allowed deductions, nor are they necessarily deductible in your field of work. If you are unsure of a specific deduction, please consult with your tax preparer.

I hereby attest that the information provided above is true and correct and is to be used in the preparation of my tax return:

Signature:_____ Date:_____