

# Lina's Tax Team

## Rental Income and Expenses

**Taxpayer Name**

### Property Information

**Address** (including unit number, city, state and zip)

**Property type** (place X next to applicable choice below )

single family residence	commercial
multi-family residence	land
vacation rental	other (explain)

**Property owner** (place X next to applicable choice below)

taxpayer	joint
spouse	

Ownership percentage

Number of days rented at fair rental value

Number of days used personally

**Active participation** (yes/no)

(Enter yes if ownership is at least 10% and you made management decisions and/or arranged repairs)

### Income

<b>Rent Received</b>	Amount on 1099-MISC	<input style="width: 80px;" type="text"/>
	Amount by cash or check	<input style="width: 80px;" type="text"/>
	Other rental income	<input style="width: 80px;" type="text"/>

### Notes

1. If your rental is a new acquisition or refinance, we need a copy of HUD Statement
2. With this organizer, we need copies of 1099MISC, lease contract, property tax statements, year-end property management reports, 1098 from bank(s)
3. We do not need receipts for repairs, supplies & utilities. Keep for your record

### Expenses

Advertising   
 Commissions

Management fees

Mortgage insurance (PMI)   
 Other insurance

Legal/Professional fees

Mortgage interest (1098)   
 Other interest

Utilities (garbage, water, gas, etc.)

Repairs   
 Supplies   
 Cleaning & maintenance

Real estate taxes   
 Other taxes / Licenses

Rental Mileage

Other expenses (HOA, Gardener, etc. - list below)

<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>
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### New Capital Asset / Renovation

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