



RENTAL PROPERTY OWNER

Name: _____ SS # _____ Tax Year: _____

MAKE COPIES IF NECESSARY. FILL OUT SEPARATE FORM FOR EACH BUILDING OR PROPERTY

WHAT TO BRING:

- Copy of current year Property Tax Statement
- ALL Closing Papers from Purchasing, Selling, Refinancing
- Landlords need to give a CRP to EACH tenant BY 1-31. We have CRP forms if you need them.
- Attach a copy of purchase settlement statement for this rental property if not previously submitted to us.

PROPERTY:

Street Address: _____

City, State, Zip: _____

Property description: _____
(duplex, condo, complex, etc.)

Was this ever the personal residence for you or your spouse?
Yes No

If yes, list dates _____

Date first used as rental property _____

Name of legal property owner _____
(as listed on title)

Has ownership of property been assigned: Yes No

If yes, Name _____

Corp. _____

Other* _____

Attach copy of any assignment

Actively managed by Taxpayer or Mgmt. Co.

If Mgmt. Co., name of Company _____

Number of days this tax year you used this property PERSONALLY _____

Number of days this tax year the property was used by anyone else for less than fair rental price _____

Number of days spent on maintenance _____

Number of days rented _____

Total Rent Collected

this Tax Year _____

(Security Deposits are NOT Income)

EXPENSES:

Advertising: \$ _____

Miles Driven for Rental Business _____

Cleaning & Maintenance \$ _____

Commissions \$ _____

Insurance \$ _____

Legal & Professional fees \$ _____

Management fees paid \$ _____

Mortgage Interest \$ _____

Property Taxes \$ _____

Supplies \$ _____

Utilities \$ _____

Do you provide utilities for your tenants? Yes No

If yes, Electricity \$ _____

Oil/Gas \$ _____

Do you have any home improvement loans? Yes No

Years of Loans _____

Amount Borrowed \$ _____

Monthly Payment \$ _____

Amount paid this year \$ _____

PURCHASE of NEW Appliance or Furnace:

(*detail on back of sheet)

\$ _____

REPAIRS:

Carpentry \$ _____

Plumbing \$ _____

Electrical \$ _____

Painting \$ _____

Appliance Purchase or repairs \$ _____

Furnace cleanup & repair \$ _____

Outside House \$ _____

Roofing \$ _____

Purchased small tools \$ _____

Other* \$ _____

Water & Sewer \$ _____

Market Value at first rental date (including land) \$ _____

Has this property been sold? Yes No

Land Value ONLY \$ _____

If yes, Date Sold _____

Capital Improvements since purchase \$ _____

Sales Price \$ _____

Provide specifics on this year's capital improvements. Please list on back.

Attach Settlement Statement.

**Use back side to list any additional information - attach all other documentation.*

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ALL FEES PAYABLE AT TIME OF SERVICE OR PRIOR TO E-FILING • CASH, CHECK, CREDIT CARD