Your rental property

Complete one copy per property. Use N/A or Not sure where appropriate.

Tax year (YYYY)

Owner / authorized contact

Rental street address

City

State

ZIP code

Property type

Ownership percentage (%)

Purchase date

First available for rent

Sale date, if any

Conversion date, if any

Days rented at fair value

Personal-use days

Vacant days

Short-term rental?

Select

Below-market rental?

Select

Services provided to guests?

Select

Describe rental use, services or changes during the year.

Income and expense totals

Enter each category separately. Attach statements and expense details.

Gross rent ($)

Advance rent ($)

Retained deposits ($)

Other income ($)

Rental platform statements / Forms 1099

Select

Property manager reports

Select

Rental expenses

Advertising ($)

Cleaning ($)

Management fees ($)

Insurance ($)

Other fees ($)

Mortgage interest ($)

Other interest ($)

Taxes ($)

Utilities ($)

Repairs ($)

Supplies ($)

Travel ($)

Other costs ($)

Expense records

Select

Explain other income/costs, estimates, missing records or items needing review.

Assets, changes and upload

We confirm how to report the activity. Keep your supporting records.

Purchases and improvements: description, cost and date placed in service.

Closing statements

Select

Land / building allocation

Select

Depreciation records

Select

Sale, refinance, prior rental losses or changes in ownership/use. Give dates and details.

Files included, missing records and questions for your preparer.

Completed by

Date completed

I checked my entries and flagged missing items

Select

Save the completed PDF. Sign in to your client portal > Documents > Upload. Include the tax year and property in the filename. Upload supporting records separately; do not email completed forms.

Organizer only - not a tax return, payment or filing authorization. Preparer review required.