



RENTAL PROPERTY & ROYALTY TAX ORGANIZER

(Include separate sheet for each rental property owned)

(Owner 1)

(Owner 2)

First & Last Name	_____	_____
Soc. Sec. Number	_____	_____
Address	_____	_____
City, State, Zip	_____	_____
Email	_____	_____
Phone Number	_____	_____

Rental Property Information

Property Information: _____

Property Type (check one): Single family home Multi-family home Vacation/Short-term
 Commercial Land Self-rental

Other (describe): _____

Property Address: _____

City: _____ State: _____ Zip: _____

Percentage of Rental Use (if not 100%): _____ % Personal Use: _____

Rental Property Income

Rental Income \$ _____ (attach 1099's received)

Rental Property Expenses

Advertising	\$ _____	Cleaning & Maintenance	\$ _____
Commissions & Fees	\$ _____	Repairs & Maintenance	\$ _____
Management Fees	\$ _____	Supplies	\$ _____
Insurance	\$ _____	Travel	\$ _____
Interest:	\$ _____	Real Estate Taxes	\$ _____
Mortgage (Paid to banks, etc.)	\$ _____	Other Taxes	\$ _____
Legal & Professional Services	\$ _____	Utilities	\$ _____
Other Expenses:			
(_____)	\$ _____	(_____)	\$ _____

Purchases of Rental Property or Improvements Made

Description	Purchase Date	New/Used	Cash Paid (if traded, boot only)	Item Traded
_____	_____	_____	\$ _____	_____
_____	_____	_____	\$ _____	_____
_____	_____	_____	\$ _____	_____

Sales of Rental Property

Description	Purchase Date	Date Sold	Original Cost	Sale Price
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____

Royalty Information

Royalties Received	\$ _____	(attach 1099's received)	
Advertising	\$ _____	Cleaning & Maintenance	\$ _____
Commissions & Fees	\$ _____	Repairs & Maintenance	\$ _____
Management Fees	\$ _____	Supplies	\$ _____
Insurance	\$ _____	Travel	\$ _____
Interest:	\$ _____	Real Estate Taxes	\$ _____
Mortgage (Paid to banks, etc.)	\$ _____	Other Taxes	\$ _____
Legal & Professional Services	\$ _____	Utilities	\$ _____
Other Expenses:			
(_____)	\$ _____	(_____)	\$ _____

Other Information

Please include a narrative if necessary of other tax information you feel needs to be known by the tax preparer.

If you receive a refund:

- _____ I would like to receive a check in the mail.
- _____ I would like to apply some or all of my refund to next year.
- _____ I would like to direct deposit my refund to the following account:

Bank _____

Account Type _____ (Checking or Savings)

Routing Number _____

Account Number _____