Rental Real Estate Organizer

Client Name(s):	Phone:
Property Number One (Check appropriate box)	Property Number Two (Check appropriate box)
Single Family residence	Single Family residence
Multi - Family residence	Multi - Family residence
Condo	
Commercial	Commercial
Other (describe	
Property Address: City / State/ Zip	Property Address: City / State/ Zip
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Did you or your family use the property during the tax year for personal purposes more than 14 days?	Did you or your family use the property during the tax year for personal purposes more than 14 days?
Yes D No	Yes No
Type of ownership: Percentage	Type of ownership: Percentage
Joint	Joint
Taxpayer	Taxpayer
Spouse	Spouse 🗖
Number of days available for rent:	Number of days available for rent:
Number of days rented:	Number of days rented:
Number of personal-use days:	Number of personal-use days:
Payments made to individual(s) for >=\$600:	Payments made to individual(s) for >=\$600:
Forms 1099 Issued? Yes No	Forms 1099 Issued? Yes No
Income	Income
Rent Received	Rent Received
Expenses	Expenses
Advertising	Advertising
Cleaning & Maintenance	Cleaning & Maintenance
Commissions Paid	Commissions Paid
Insurance	Insurance
Legal & Professional Fees	Legal & Professional Fees
Management Fees	Management Fees
Mortgage Interest	Mortgage Interest
Other Interest	Other Interest
Repairs	Repairs
Supplies Taxes	Supplies Taxes
Utilities	Utilities
Other Expenses	Other Expenses
Travel to check on property:	Travel to check on property:
Business Miles 1-1-22 to 06-30-22	Business Miles 1-1-22 to 06-30-22
Business Miles 7-1-22 to 12-31-22	Business Miles 7-1-22 to 12-31-22
Total 2022 Mileage for all purposes	Total 2022 Mileage for all purposes
Airfare	Airfare
Hotel	Hotel
Meals	Meals
Car Rental	Car Rental
Other	Other
Asset Purchases Date Cost	Asset Purchases Date Cost
Land	
Home / Building	Home / Building
Improvements * Furniture & Fixtures *	Improvements *
	Furniture & Fixtures *
Other (List) *For additional space, attach separate sheet or provide copies of	Other (List) *For additional space, attach separate sheet or provide copies of
receipts.	receipts.