



## 2023 Tax Organizer and Questionnaire for Rental Income and Expenses

This tax organizer can be filled-out and submitted to us with the necessary documents attached. Once we receive it, we will review it and call you with any questions and set a conference date if necessary in order to complete your return. If you have more than 3 properties, just use multiple copies of this form.

### Rental Income and Expenses

For Each Rental Real Estate Property, List the Location and Type of Property:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Were any of the properties purchased/converted to rental in 2023? If so, we need the closing statements.

Please fill out the income and expenses applicable for each property. If you have more than three properties, please ask for additional schedules.

	Property 1	Property 2	Property 3
<b>Income:</b>			
Rents Received	_____	_____	_____
<b>Expenses:</b>			
Advertising	_____	_____	_____
Association Dues	_____	_____	_____
Auto and Travel	_____	_____	_____
Cleaning/Maintenance	_____	_____	_____
Commissions	_____	_____	_____
Gardening	_____	_____	_____
Insurance	_____	_____	_____
Labor	_____	_____	_____
Professional Fees	_____	_____	_____
Miscellaneous	_____	_____	_____

Mortgage Interest

	Property 1	Property 2	Property 3
Other Interest			
Repairs and Maintenance			
Supplies			
Taxes			
Telephone			
Utilities			
Improvements			
<b>Other:</b>			

Did you materially participate in these rental properties?

Did you use any property for personal purposes for more than 14 days?

If we have not done your return previously, we will need the asset/depreciation list for each property to determine the current year depreciation.

An asset addition and an asset form list follow.



Preparer use only

Activity name \_\_\_\_\_

Use the comments section to provide additional information about the asset. Enter information such as vehicle mileage (total, commuting and business), the total and business square footage of home, home expenses (total and business portion). See the EXAMPLE asset below.

		Description of Asset Acquired	Date Acquired	Cost or Basis
<b>EXAMPLE</b>		2020 Model T - (EXAMPLE ASSET)	03/09/20	25,750
	Comments:	22,500 job-related miles, 25,000 total miles		
1	Comments:			
2	Comments:			
3	Comments:			
4	Comments:			
5	Comments:			
6	Comments:			
7	Comments:			
8	Comments:			
9	Comments:			
10	Comments:			
11	Comments:			
12	Comments:			
13	Comments:			
14	Comments:			
15	Comments:			
16	Comments:			
17	Comments:			
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22	Comments:			
23	Comments:			
24	Comments:			
25	Comments:			