

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.

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

Rental Income and Expenses

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Were any of the properties closing statements.		ed to rental in 2023	? If so, we need the
Please fill out the income a than three properties, pleas			rty. If you have me
	Property 1	Property 2	Property 3
Income:			
Rents Received			
Expenses:			
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			
Other:			

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.

2023 Tax Questionnaire

Form ID: OrgDp	Depreciation - Asset List	94

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Activity name		-		

HOW TO REPORT DISPOSALS: Use the blank line directly below the asset information to indicate any asset disposals. Enter the date of the disposal and/or sale proceeds, if applicable. Enter additional information regarding the asset disposal in the comments section, such as if the asset was sold on installment, traded for other asset(s), disposed of due to casualty, or sold to a related party. See the EXAMPLE asset below.

Asset No.	Description of Property	Date in Service	Cost or Basis
	Comments	Date Sold/Disposed	Sales Price
EXAMPLE	Machinery and equipment (EXAMPLE ASSET)	11/21/13	42,500
	Collected in 5 equal payments over 2 yrs	03/09/20	20,000
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			Form ID: OrgD

Form	ID:	OrgDp2	

Activity name

Depreciation - Asset Acquisitions

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Preparer use only

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
EXAMPL	F	2020 Model T - (EXAMPLE ASSET)	03/09/20	25,750
	Comments:	22,500 job-related miles, 25,000 total miles	1	
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