

2022 RENTAL INCOME FROM REAL ESTATE

If more than one property, please photocopy this form and use one organizer for each. If using accounting software, you may attach the income/loss statements for 2022 rather than completing Section 2 of this organizer. Sections 1 and 3 must be completed by each client.

SECT	ION	1.
JLUI		

Address of Property:

Please check one: Residential Single-Family Residential Multi-Family Commercial

Vacation/Condo Self-Rental Land

Is this property held by a single-member LLC? Y N

If yes, please provide:

Federal EIN:

State of formation Date of formation

State Account ID (if applicable)

Did you materially participate in this business? Y N

If unsure, please answer the following and we will discuss

Are you a real estate professional? Y N

Cost of property? Date purchased

Cost of land (if it can be stated separately)

Did you use your rental for personal use at any time during the year? Y N

If so, how many days?

Total days actively rented

Did you make any payments in 2022 that would require you to file a form 1099? Y

If yes, did you issue those 1099 forms Y N

SECTION 2:

Rental Income

Rental Income \$

EXPENSES

Please enter dollar amounts for any items that you paid for a rental property in 2022. The IRS states that business expenses must be "necessary and reasonable." Do not include indirect expenses related to business use of your home – list these expenses under "business use of home".

Advertising Legal and Professional fees

Property Taxes Rent or Lease-vehicles, machinery & equipment

Management fees Rent or Lease-other business property

HOA fees Repairs
Cleaning and maintenance Supplies

Insurance Licenses & permits

Interest-mortgage (paid to banks, etc.)

Travel

Interest-other

Utilities

•	\$	
	\$	
	\$	
Property Improvements made in 2022		
Provide details of any major property improvements. Yo copies of invoices.	u must include a description and date as well as all	
	\$	
	\$	
	\$	
Vehicle Expenses (Note - this section is to be use	d for rental property management purposes only)	
Do you use your car for business purposes (really like the following quest your return can be completed.	lated to rental)? Y N ions. The following must be answered before	
Please note that in addition to a mileage log or cal receipts from oil changes or service visits to utilize		
Description of vehicle (year, make and model)		
Date you began using this vehicle for your busines	s	
Total purchase price of vehicle (including sales tax)		
Do you have another vehicle available for persona	use? Y N	
*Total number of miles driven during 2022:		
Total number of business miles driven during 2022	:	
Total miles on vehicle		
Average daily round trip commuting distance		
*Total commuting (driven for W-2 employment) miles for	year:	
*Personal miles other than commuting:		
Do you have adequate records or sufficient evidence to	justify these deductions? Y N	
,	Y N	
These miles are not deductible but MUST be listed on your tax return.		
Signature:	Date:	

Other Expenses