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RENTAL ORGANIZER

Use for your residential or commercial rental property for your individual (Schedule E) or business (LLC, S Corp or partnership) tax returns

Property owner name: [] EIN or SSN: []

Property location/address: [] Tax year: []

Indicate Property Type:
[] Residential
[] Commercial

Indicate Property Ownership:
[] Taxpayer [] Spouse [] Joint
[] Partnership or LLC [] S Corporation

Issuance of 1099 to Service Providers:
[] Pay \$600 or more to service provider?
[] Did you give 1099 to non-incorporated providers?

Were you actively involved in the management of the rental activity of this property? [] No [] Yes

Is the owner(s) a real estate professional? [] No [] Yes [] Unsure if I qualify, please discuss with us

To be a real estate professional, more than half of your work time must be in the profession and you must work more than 750 hours in a real property trade or business as a self-employed individual or as the owner of a business entity.

Was this property used for personal purposes by the owner or owner's family? [] No [] Yes

If used for personal purposes - indicate number of days used personally: [] & indicate number of days rented: []

Rental Income (net of sales tax collected, if applicable) \$ []

Expenses

Table with columns for Expense Category and Amount. Rows include Advertising, Automobile & travel, Cleaning and maintenance, Commissions, Insurance, Accounting & tax preparation, Legal & other professional, Management fees, Mortgage interest paid to banks (Form 1098), Other interest, Repairs, Supplies, Taxes - real estate, Taxes - other, Utilities, Association dues (regular, non-capital), and Other expenses (list).

Provide a copy of the closing statement & a list of all the improvements made to the property after you purchased it if

- [] you acquired a rental property during the year or
[] you converted a property to rental use during the year.
Date Placed in service: (available for rent)

RENTAL PROPERTY IMPROVEMENTS

If you spend money on improvements to an existing rental property during the year, provide details below:

Table with columns for Description, Date, and Cost. Multiple rows for recording improvements.

DEPRECIATION: provide depreciation schedules from the prior year if we did not prepare your return for that year.

[] If you sold any rental properties during the year, provide copies of the closing statements from the sale of and from the purchase of the property and a detailed list of all improvements made to the property during your ownership.