

**Real Estate Rental Income Tax Checklist**

Personal Use Days:

New Purchase or Existing Rental?  New / Existing

Address: \_\_\_\_\_

Number/Apt: \_\_\_\_\_

Rent Amount	Rent Collected
Total:	<input type="text"/>

Major Improvements/Purchases of \$2500 or more:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Notes or Questions:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Expenses**

Advertising	<input type="text"/>
HOA	<input type="text"/>
Cleaning & Maintenance	<input type="text"/>
Pool Maintenance	<input type="text"/>
Garden/Lawn Service	<input type="text"/>
Insurance	<input type="text"/>
Insurance (Other)	<input type="text"/>
Umbrella Policy	<input type="text"/>
Education	<input type="text"/>
Home Warranty	<input type="text"/>
Legal/Accounting	<input type="text"/>
Bank Fees	<input type="text"/>
Management Fees	<input type="text"/>
Painting	<input type="text"/>
Pest Service	<input type="text"/>
Plumbing/Electrical	<input type="text"/>
General Repairs	<input type="text"/>
Property Taxes	<input type="text"/>
Utilities	<input type="text"/>
Miles Driven	<input type="text"/>
Other	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

Lease Agreement? Y / N

750+ hours spent on rental properties Y / N

Cost Segregation on this property? Y / N