

**RENTAL PROPERTY INCOME & EXPENSE REPORT  
For Tax Year 2023**

**This form is for reporting income and expense on a property you rent. Provide this report with your Personal Client Tax Organizer.**

**If you own more than one rental property, a separate report should be provided for each one.**

Your name

Property Street Address

City, State, Zip

**SECTION I—PROPERTY INFORMATION**

**If this is a new property (not on your tax return last year) provide copy of purchase (closing) documents.**

A. Was this property sold this year??

No  Yes

B. The property is owned by (check one):

Taxpayer  Spouse  Jointly Owned

C. Was this property managed or leased by a property management company?

No  Yes

D. Is this property also owned by a person that is not part of your tax return, e.g. a relative or other joint owner?

No  Yes

E. Check the applicable type of property (check only one):

Single Family  Multi-Family  Commercial Property

Vacation/Short Term Use (Air BNB)  Land Only

Other: Describe:

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F. Indicate the total days of use for each of the following (total should equal number of days in the year)

Number of days property was rented or available for rent last year	
Number of days the property was used by you personally, e.g. for vacation	

### SECTION II—PROPERTY USE & IMPROVEMENT

<b>Check the appropriate answer to the questions below</b>	<b>Yes</b>	<b>No</b>
Was this property inherited this year prior to use as a rental property?		
Did you purchase the property this year?		
Did you sell or refinance the property this year?		
Did you convert this property from personal use to rental use this year?		
Were any large improvements made this year (e.g. new roof, floors, renovation, etc.)?		
Were new furnishings or appliances acquired this year (e.g. stove, refrigerator, furniture, etc.)?		
Were any furnishings or appliances disposed of this year?		

### SECTION III—INCOME INFORMATION

**Total Rental Income Received for the year**   
**For this property**

### SECTION IV—EXPENSE INFORMATION

<b>Category</b>	<b>Amount Paid</b>
Advertising	
Cleaning & Maintenance*	
Commissions Paid*	
Insurance	

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Legal & Professional Fees	
Management Fees*	
Mortgage Interest	
Utilities	
Taxes	
Repairs	
Supplies	
<b>LIST OTHER EXPENSES BELOW (INDICATE NATURE &amp; AMOUNT)</b>	

**(\* If you paid \$600.00 or more to an individual , you are required to file a Form 1099-NEC**

**NUMBER OF MILES DRIVEN ON YOUR PERSONAL CAR IN CONNECTION WITH THIS PROPERTY \_\_\_\_\_**

**Indicate any questions, concerns or circumstances you want to discuss or want us to know in the space below.**