

# Family TAX OFFICE

## RENTAL PROPERTY CHECKLIST

Owner Names: \_\_\_\_\_

Owner Names: \_\_\_\_\_

Percentage of ownership? \_\_\_\_\_%

Type of Property \_\_\_\_\_ If other, enter here: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

*Fill out ONLY if new rental*

Land Value: \_\_\_\_\_ Building Depreciable Value: \_\_\_\_\_

*(check property tax assessor's office valuation online)*

Fair rental days \_\_\_\_\_ personal use days \_\_\_\_\_

Rent income \_\_\_\_\_

Advertising \_\_\_\_\_

Auto; see *business use of vehicle checklist*

*(includes trips to bank to cash rent checks, to make purchases and check on the property)*

Travel \_\_\_\_\_ airfare/lodging/meals

Cleaning and Maintenance \_\_\_\_\_

Commission's \_\_\_\_\_

Insurance \_\_\_\_\_

Legal and Professional fees \_\_\_\_\_ *Includes tax prep fees*

Management Fees \_\_\_\_\_

Mortgage Interest \_\_\_\_\_

Other Interest \_\_\_\_\_ *charge card interest on purchases for rental property*

Repairs \_\_\_\_\_

Supplies \_\_\_\_\_ *made keys?*

Real Estate Taxes \_\_\_\_\_

Utilities \_\_\_\_\_

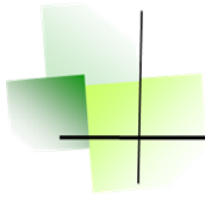
HOA'S \_\_\_\_\_

Other expenses \_\_\_\_\_

**(760) 870-4441 text (858) 301-6100 office (760) 870-7770 fax**

14231 Garden Rd Suite 11 Poway Ca 92064

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Any appliances or major purchases such as roof's, central air conditioners, fences, and driveways etc. list dates purchased and purchase price below:

Item: \_\_\_\_\_ Date: \_\_\_\_\_ Price: \_\_\_\_\_

Item: \_\_\_\_\_ Date: \_\_\_\_\_ Price: \_\_\_\_\_

Item: \_\_\_\_\_ Date: \_\_\_\_\_ Price: \_\_\_\_\_

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Item: \_\_\_\_\_ Date: \_\_\_\_\_ Price: \_\_\_\_\_

Item: \_\_\_\_\_ Date: \_\_\_\_\_ Price: \_\_\_\_\_

Questions to ask the tax preparer?

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