

2023 RENTAL ORGANIZER



CLIENT NAME _____

Prop #	H W J	S M V L C	Description of Property and Location	Name on Deed	Name on Mortgage	Mortgage Balance 12-31-23
1						
2						
3						
4						

H= Husband W= Wife J=Joint /// S= Single Family M= Multi Family V= Vacation L= Land C= Commercial

INCOME	1	2	3	4
# Days property available for rent at FMV				
1. Rents received (Not security deposit)				
2. Royalties received				
3. Other				

EXPENSES	1	2	3	4
10. Advertising				
11. Auto and Travel (complete "Vehicle Expenses" section on back also)				
12. Association Dues				
13. Cleaning and Maintenance				
14. Insurance				
15. Legal & Other Professional Fees				
16. Management Fees				
17. Mortgage Int Paid Banks, provide 1098				
18. Other Interest (security deposit interest)				
19. Repairs				
20. Supplies				
21. Taxes				
22. Utilities				
23. License (Rental)				
24. Wages and Salaries				
25. Other (please list):				

Do you use a management company for this property?	YES NO	YES NO	YES NO	YES NO
Did you manage this property?	YES NO	YES NO	YES NO	YES NO
Personal Use Percentage	%	%	%	%
Were payments made that required filing forms 1099?	YES NO	YES NO	YES NO	YES NO
If Yes, were all required forms 1099 filed or will be filed?	YES NO	YES NO	YES NO	YES NO
For each property, did you or any family member use it for personal purposes for more than the greater of 14 days or 10% of the total days rented?	YES NO	YES NO	YES NO	YES NO
Is this property a Vacation Rental?	YES NO	YES NO	YES NO	YES NO
Vacation Property Total Days Rented				
Vacation Property Personal Use Days				
Is the Average Rental Period Less Than 7 Days?	YES NO	YES NO	YES NO	YES NO

List on back, purchases of Equipment, Furniture, Vehicles, or Property Improvements

IF A PURCHASE, SALE, OR 1031 EXCHANGE, PLEASE PROVIDE THE HUD STATEMENT

NEW EQUIPMENT/CAPITAL IMPROVEMENTS						
If during the year you purchased Equipment, Furniture, Vehicles, or made Property Improvements, list below. (Do not duplicate the other side.)						
Property Number	Description	Date	Cost	Asset Was		If Trade-In Involved
				New	Used	Description

DEPRECIABLE ASSETS SOLD OR DISPOSED OF					
Property Number	Description	Date Acquired	Original Cost	Date Disposed of	Describe Means of Disposal

VEHICLE EXPENSES (vehicle used in association with rental property only)	Vehicle 1	Vehicle 2
1. Enter date vehicle was placed in service		
2. Total mileage vehicle was used from Jan. 1 to Dec. 31 2023		
3. Miles included on line 2 that vehicle was used for rental business Jan 1 to Dec 31, 2023		
4. Do you or your spouse have another vehicle available for personal purposes?	YES	NO
5. If your employer provided you with a vehicle, is personal use during off-duty hours permitted?	YES	NO
6A. Do you have evidence to support your deduction?	YES	NO
6B. If "Yes," is the evidence written?	YES	NO