Information we are waiting for:

Questions:

2023 Tax Year Rental Income and Expenses

First year of rental income: **Yes/No**
What portion of the yr. was your property rented or trying to be rented? _____ months
Name of Rental Business: _____
Full Address: _____
Phone # _____ Ownership Interest: _____
Do you live in a portion of the rental bldg? **Yes/No**
If yes complete the following: Total sq. footage of unit: _____
Sq. footage of rental space: _____
Personal portion percentage: _____

Gross Rent: _____

Expenses

Advertising: _____
Insurance: _____
Mortgage Interest & Bank Charges _____
Office Expenses: _____
Legal, acct.,& professional fees _____
Management & Admin Fees: _____
Maintenance & Repairs (100% for rental unit): _____
Maintenance & Repairs (prorated for rental unit): _____
Salary/Wages: _____
Property Taxes: _____
Travel: _____
Utilities: _____
Landscaping costs: _____
Other: _____

Auto Expenses only claimable if you have 2 or more properties away from your place of residence:

Total rental related km's driven _____ Total km's driven _____
Fuel _____ Repair & Maint _____ Insurance: _____ Lic.&reg.: _____
Leasing-Date lease started _____ Value of vehicle _____
Car washes _____ Parking _____ Interest on car loan: _____
Type of vehicle: _____

Capital Expenditures:

Renovations & Upgrades: _____
Any U.C.C. _____
Purchase or rollover of appliances or furniture: _____

Market Value: _____ Claiming depreciation on building? **Yes/No**