

RENTAL INCOME & EXPENSE SUMMARY

20

GENERAL INFORMATION REQUIRED

PROP #

PROP #

PROP #

Who Owns the Property or SM LLC?

[] T [] S

[] T [] S

[] T [] S

NAME OF LLC

EIN if you have one

IF YOU OWN LESS THAN 100%, WHAT

%

%

%

Property Address

City, State, Zip

Type SF, MF, V, C, L, R, SR, Other *

* Property Types: SF=Single Family MF=Multi Family V=Vacation C=Commercial L=Land R=Royalty SR=Self Rental

Is Tenant Related To You? How?

[]

[]

[]

What is Fair Rental Value of Prop?

\$

\$

\$

Do You live on the property? If so, what %

[] Y

%

[] Y

%

[] Y

%

Is This Your Main Home?

[] Y

[] N

[] Y

[] N

[] Y

[] N

Was Property Purchased this tax year?

[] Y

Bring Hud-1

[] Y

Bring Hud-1

[] Y

Bring Hud-1

Did you Make Improvements this tax year?

[] Y

List Below

[] Y

List Below

[] Y

List Below

Did you Sell the Property this tax year?

[] Y

All HUD-1's

[] Y

All HUD-1's

[] Y

All HUD-1's

Are you Actively Involved?

[] Y

[] Y

[] Y

Real Estate Professional? If you think you are, we will discuss the rules. Most cannot qualify. Yes []

Did you make Payments requiring 1099? [] Y [] N If so, did you issue the 1099(s)? [] Y [] N

Do you have bank statements, invoice books, receipts, etc. to PROVE Income & Expense? [] Y [] N
IF NO, How Were The Amounts Determined?

Was any Income received or Expenses paid with CRYPTO CURRENCY? [] YES [] NO

INCOME

Fair Rental Days # / Personal Use Days #

/

/

/

Rents Received

Rent Traded For Work Done By Tenant

Payments Made By Tenent (Mortgage, etc.)

Sale of Items expensed as de minimis

RENTAL EXPENSES

AUTO TOTAL MILES

AUTO Business Miles for Standard Rate

AUTO Interest

Advertising

Appliances & Equipment less than \$500

Cleaning-Maintenance-Lawn Care-Pest

Commissions

Insurance

Legal and Professional

Management Fees

Interest-Mortgage, attach Forms 1098

Interest Other, provide name, address, ssn

Repairs (less than \$500 per project)

Supplies

Taxes

Travel Lodging

Travel Meals Number of Days

#

#

#

Utilities

PROPERTY IMPROVEMENTS & EQUIPMENT - More than \$500 per project or per Item

Describe

Date Completed

Amount

Describe

Date Completed

Amount