



RENTAL TAX ORGANIZER

Terms of Use: This form is designed to assist the user in gathering the pertinent information needed to have Barlow Douglas & Hall CPAs, PLLC report a rental property on a tax return. Though it covers the majority of tax options, the user may find some adaption to their particular tax situation is required. In addition, while this form may help the user discover additional tax deductions that may save them money, this form in no way guarantees tax savings or reduced tax liability. By using this form the user agrees that Barlow Douglas & Hall is not responsible for the outcome of the user’s tax preparation.

Section 1: Property Information

	Property #1	Property #2	Property #3
Location/ Address			
Type: (Resident./Commercial)			
Date Purchased			
Purchase Price			

Section 2: Income and Expenses

	Property #1	Property #2	Property #3
Income/Rent Received			
Advertising			
HOA Dues			
Insurance			
Landscaping			
Legal/Professional			
Maintenance			
Management Fee			
Mileage			
Mortgage Interest			
Repairs			
Supplies			
Taxes			
Travel			
Utilities			

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INSTRUCTIONS FOR RENTAL TAX ORGANIZER

These instructions are for clarification on the more complex parts of each section of the organizer. It is organized in the same order as the rental organizer.

Section 1: Property Information

Location: Enter the street address, city, state and zip of your rental property.

Type: What type of building is your rental? Condominium, residential, commercial, town house, duplex, etc.

Date Purchased: This is the date that appears on your HUD statement. The only exception is if you purchased the property prior to actually renting the property. For example, sometimes people will move to a new personal residence and rent out their old home. In this case, put the date you begin renting the property.

Purchase Price: This is the amount you paid for the property. This number is very important in calculating your depreciation deduction. Also include what the land is worth if you have that information available.

Section 2: Income and Expenses

The first line is for the income you received for each property.

The remaining lines are for common deductions relating to rental property. If you have an expense that is not on the list, please make a note in the "Other Items" section.

Section 3: Equipment and Improvements

This section is for any equipment or "depreciable" property you place in the rental (such as new appliances and furniture) and/or any major renovations or improvements made to the property. Indicate the item purchased, when you put the item in the rental, and how much you paid for each item.

Section 4: Other Items

Use this space to add any expenses or deductions not included on the list. You may also make note of any questions you may have that you would like to ask our office.

If you have any questions about the organizer, instructions, or anything related to your tax return, please call us.

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