

Tax & Financial Advisors, Inc.

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Rental Property Worksheet

Client Name: _____

PROPERTY ADDRESS	Property A	Property B	Property C
Rents Received:	\$	\$	\$
Is property used for personal use?			
Date placed in service:			

Expense Categories	Property A	Property B	Property C
Advertising	\$	\$	\$
Auto & travel (Miles Driven)			
Cleaning & maintenance	\$	\$	\$
Commissions	\$	\$	\$
Insurance	\$	\$	\$
Legal & other professional fees	\$	\$	\$
Management Fees	\$	\$	\$
Mortgage Interest paid to banks, etc.	\$	\$	\$
Other Interest	\$	\$	\$
Repairs	\$	\$	\$
Supplies	\$	\$	\$
Taxes	\$	\$	\$
Utilities	\$	\$	\$
Other (list):	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

MAJOR IMPROVEMENTS OR PROPERTY INFORMATION

Property Purchased or Improvements Made

Address	Date Purchased	Cost	Date Placed in Service
		\$	
		\$	
		\$	

Property Sold or Taken Out of Service

Address	Date Sold or Out of Service	Selling Price	Trade in?
		\$	
		\$	
		\$	