



# Nelson Company, P.C. Tax Organizer

Do NOT use estimates and please provide copies of forms  
The IRS is more likely to audit if they see a round number (i.e. 0 or 5, seriously)

## Rental Property

Name: \_\_\_\_\_

Before you start entering numbers, please take 30 seconds to read through both pages.

Address: \_\_\_\_\_

Rental Type:  Single Family Res.  Multi-Family Residence

Commercial  Land

Vacation Rental → \_\_\_\_\_ Number Days Rented  
\_\_\_\_\_ Number Days Personal Use

Date Rental Began (or Ongoing): \_\_\_\_\_

Date of Purchase: \_\_\_\_\_

if new this year, please provide final settlement stmts (final HUD)

if refinanced this year, please provide final settlement stmts (final HUD)

Rents Received \_\_\_\_\_

Deposits Received \_\_\_\_\_

Deposits Returned \_\_\_\_\_

Advertising \_\_\_\_\_

Tenant Screening/Security Check \_\_\_\_\_

Property Management Fees Paid \_\_\_\_\_

Cleaning Fees (include supplies/services) \_\_\_\_\_

Maintenance (include painting/yard) \_\_\_\_\_

Hazard Insurance \_\_\_\_\_

Supplies (include décor and small tools) \_\_\_\_\_

Repairs (include paint, locksmith, plumbing, etc) \_\_\_\_\_

Property Taxes \_\_\_\_\_

Utilities (include water, heat, power, garbage) \_\_\_\_\_

HOA Fees \_\_\_\_\_

Office Supplies \_\_\_\_\_

Legal or Tax Preparation Fees\* \_\_\_\_\_

Cell Phone & Internet Fees\* \_\_\_\_\_

Meals (while working on the property) \_\_\_\_\_

Number of Miles Driven (for any rental purpose) \_\_\_\_\_

Please provide these documents:

1098 Mortgage Int.

Property Tax Bill

List appliance purchases on page 2

\_\_\_\_\_ Business use percentage %

\*if not already deducted on a sole proprietorship or business tax form



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## Appliances, Major Improvements, Landscape Design

Description	Total Cost	Date in Service
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

## Other Expenses Not Listed on Page 1

## \$ Amount

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

## Notes