



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)

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

Please provide these documents:

☐ 1098 Mortgage Int.
☐ Property Tax Bill

List appliance purchases on page 2

Business use percentage %



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Did you pay at least \$600 during the year for services to an individual, contractor, or non-corporation?

If you answered 'yes' to the above question, did or will you issue any 1099's for the year?

Appliances, Major Improvements, Landscape Design

[illegible]

Other Expenses Not Listed on Page 1

\$ Amount

[illegible]

Notes