



# 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 \_\_\_\_\_

Please provide these documents:

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

1098 Mortgage Int.

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

Property Tax Bill

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) \_\_\_\_\_

List appliance purchases on page 2

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

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

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

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

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

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

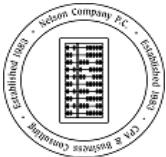
Cell Phone & Internet Fees\* \_\_\_\_\_

Business use percentage %

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



## **Nelson Company, P.C. Tax Organizer**

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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

## Notes