

Rental Property Income & Expenses Intake Form

Client Information

Full Name: _____

SSN / TIN: _____

Phone Number: _____

Email: _____

Property Information

Property Address: _____

Type of Property (Single Family / Multi-Family / Condo / Commercial / Other): _____

Date Property Acquired: _____

Purchase Price: \$_____

Mortgage Lender (if applicable): _____

Property Management Company (if applicable): _____

Income Information

Rental Income Received: \$_____

Late Fees / Other Tenant Charges: \$_____

Security Deposits Retained (if any): \$_____

Other Income (Laundry, Parking, etc.): \$_____

Attach supporting documents (bank statements, rental ledgers, etc.): Yes / N/A

Expenses

Mortgage & Financing:

- Mortgage Interest Paid (Form 1098): Yes / N/A

- Loan Points Paid: Yes / N/A

- Other Financing Costs: Yes / N/A

Property Expenses:

- Property Taxes: Yes / N/A

- Insurance (Property, Liability, etc.): Yes / N/A

- Utilities Paid by Owner (Electric, Gas, Water, Sewer, Trash): Yes / N/A
- Repairs & Maintenance: Yes / N/A
- Landscaping / Lawn Care: Yes / N/A
- HOA / Condo Fees: Yes / N/A
- Management Fees: Yes / N/A
- Advertising / Tenant Screening: Yes / N/A
- Legal / Professional Fees: Yes / N/A
- Supplies / Small Equipment: Yes / N/A
- Travel Expenses for Property Management: Yes / N/A
- Depreciation Information (Cost of Property, Land Value, Improvements): Yes / N/A
- Other Expenses (Specify): _____

Other Information

- Were any personal expenses paid from the rental account? Yes / No
- Were any improvements made this year (not repairs)? Yes / No
- Any casualty or theft losses? Yes / No
- Previous year rental property tax return available? Yes / No

Authorization

I hereby authorize [Your Company Name] to prepare the tax return for the above rental property using the information provided. I certify that the information is accurate and complete to the best of my knowledge.

Signature: _____ Date: _____