



personal touch tax & financial consultants

3207 emerald boulevard ♦ long pond, PA 18334 phone: 570.646.8102 fax: 570.643.5004

RENTAL PROPERTY WORKSHEET

IF THERE ARE ANY QUESTIONS PLEASE FEEL FREE TO CALL US FOR ASSISTANCE.
REMEMBER TO ROUND TO THE NEAREST WHOLE DOLLAR.

FIRST NAME _____ MIDDLE _____ LAST _____

TAX YEAR _____

IF THIS IS THE FIRST YEAR YOU HAVE OWNED THIS PROPERTY, PLEASE PROVIDE SETTLEMENT SHEET

PROPERTY ADDRESSES AND DESCRIPTION

ADDRESS _____ ADDRESS _____

CITY _____ STATE _____ ZIP _____ CITY _____ STATE _____ ZIP _____

ADDRESS _____ ADDRESS _____

CITY _____ STATE _____ ZIP _____ CITY _____ STATE _____ ZIP _____

FOR EACH RENTAL PROPERTY LISTED DID YOU OR YOUR FAMILY USE IT DURING THE TAX YEAR FOR PERSONAL PURPOSES FOR MORE THAN THE GREATER OF 14 DAYS OR 10% OF THE TOTAL DAYS RENTED AT FAIR RENTAL VALUE?

	<input type="checkbox"/> YES <input type="checkbox"/> NO PROPERTY 1	<input type="checkbox"/> YES <input type="checkbox"/> NO PROPERTY 2	<input type="checkbox"/> YES <input type="checkbox"/> NO PROPERTY 3	<input type="checkbox"/> YES <input type="checkbox"/> NO PROPERTY 4
RENTS RECEIVED				
ADVERTISING				
AUTO & TRAVEL				
CLEANING & MAINTENANCE				
COMMISSIONS				
INSURANCE				
LEGAL & PROFESSIONAL FEES				
MANAGEMENT FEES				
MORTGAGE INTEREST				
OTHER INTEREST				
REPAIRS				
SUPPLIES				
TAXES				
UTILITIES				
RENOVATIONS (EXPLAIN)				
LABOR PAID				
OTHER (LIST)				
ORIGINAL PURCHASE PRICE				
COST OF ANY IMPROVEMENTS				
DATE PLACED IN SERVICE				



TAX PREP



TAX PLANNING



CONSULTING



RECORD KEEPING



PAYROLL



TRAINING



REPRESENTATION



SCAN & ARCHIVE