

Taxpayer Name _____

2023 Rental Properties Worksheet

Did you convert your principal residence to a rental property or vice versa? Yes No Date: _____

Property #1 Address: _____

Property #2 Address: _____

Purchase Date: _____ **Purchase Price:** _____
Sale Date: _____ **Sales Price:** _____

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Sale Date: _____ **Sales Price:** _____

Type of property? Condo Single Family Home Multi Unit

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Owned By: Taxpayer Spouse Joint

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Business Entity or Holding Company: _____

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Income
\$ _____ Rents Received \$ _____ 1099 Received
\$ _____ Security Deposits Received
_____ # Days Used for Personal **HUD Rec'd:**
_____ # Days Used for Rental
_____ # Hours Owner worked on Rental Property

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\$ _____ Rents Received \$ _____ 1099 Received
\$ _____ Security Deposits Received
_____ # Days Used for Personal **HUD Rec'd:**
_____ # Days Used for Rental
_____ # Hours Owner worked on Rental Property

Did you send a 1099 to anyone who provided services totaling over \$600?

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Expenses Yes No

Expenses Yes No

- \$ _____ Advertising
- \$ _____ Air Conditioner (purchase)
- \$ _____ Alarm System
- \$ _____ Association Dues
- _____ Automobile Mileage
- \$ _____ Casual Labor
- \$ _____ Cleaning
- \$ _____ Credit Checks
- \$ _____ Hot Water Heater (purchase)
- \$ _____ Insurance
- \$ _____ Lawn Care
- \$ _____ Licenses
- \$ _____ Locks and Keys
- \$ _____ Mortgage Interest
- \$ _____ Office Supplies
- \$ _____ Pest Control
- \$ _____ Professional Fees
- \$ _____ Property Management
- \$ _____ Property Taxes
- \$ _____ Rental Bank Charges
- \$ _____ Repairs
- \$ _____ Security Deposits Returned to Tenant
- \$ _____ Storage
- \$ _____ Supplies
- \$ _____ Telephone
- \$ _____ Tools
- \$ _____ Travel
- \$ _____ Utilities
- \$ _____ Other: Please List _____

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Did you make any property improvements?
(e.g. flooring, kitchen, bathroom, etc?) _____

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