

Rental Income Summary

If you have a rental property, please complete the following form and return it to our office with your tax records.

Name: _____ % _____

Name: _____ % _____

Property Address: _____

NEW! Is your property a short-term rental (less than 90 days)? Yes No

If yes, please provide a copy of your short-term rental license for 2024.

Is rental part of your residence? Y N

If not part of residence:

Total Residence _____ Sq Ft # of days rented in tax year _____

Rental Portion _____ Sq Ft # of days personal use in tax year _____

Income:

Gross Rent (Number of Units _____) _____

Other Income (Details _____) _____

Total _____

Expenses:

Advertising _____

Insurance _____

Interest – Mortgage _____

Interest – Other (line of credit) _____

Legal & Accounting Fees _____

Office _____

Management & Administrative Fees _____

Maintenance & Repairs* _____

Salaries, Wages & Benefits _____

Property Taxes _____

Utilities _____

Strata Fees _____

Total _____

*Details of large expenses included in Maintenance & Repairs

Purchase or Sale (in the current tax year) provide copies of:

- Statement of Adjustments
- Other expenses incurred to sell the property
- Mortgage / finance documents
- Order to Pay