

# 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