INVESTMENT PROPERTY
INCOME AND EXPENSES

NAME	TAX YEAR

PROPERTY 1 ADDRESS (Include ZIP)	
PROPERTY 2 ADDRESS (Include ZIP)	
PROPERTY 3 ADDRESS (Include ZIP)	

	Type of Property (from list below)	For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture.	Fair Rental Days	Personal Use Days	QJV
A					
B					
C					

Type of Property:			
1. Single Family Residence	3. Vacation/Short-Term Rental	5. Land	
2. Multi-Family Residence	4. Commercial		

	PROPERTY 1	PROPERTY 2	PROPERTY 3
Rental Income Received			
Advertising			
Auto (Miles Driven)			
Overnight Travel (Air, Taxis, Lodging)			
Meals on Overnight Travel			
Cleaning/Maintenance			
Commissions and Fees			
Insurance/PMI			
Legal and Professional Fees			
Management Fees			
Mortgage Interest			
Other Interest			
Repairs and Improvements*			
Supplies/Small Tools			
Real Estate Taxes			
Utilities			
Condo/HOA Fees			
Other Expenses (Specify)			
Date Placed in Service mm/dd/yy**			
Was the Property Sold? (Y/N)			

***For Repairs and Improvements provide a Description, Date, and Cost for each Item.**
****For properties placed in service this year only. Please provide HUD-1 and related information.**
If you refinanced existing property this year please provide HUD-1(s) for the REFI(s).
For new clients, please provide Depreciation Worksheets/Schedules. These should be included in your prior year tax returns. If not, please ask your previous Tax Preparer for these sheets.

Details of Repairs and Improvements (please add additional pages, if necessary)

Description	Date	Cost

By completing this form, the client certifies that the entries can be substantiated by documentation.