



Business Information

- Full name, EIN if registered as LLC or other business entity
- Full addresses of all properties
- Type of rental (ex: single family residential, duplex, commercial building)
- Dates rented
- Copy of last year's federal and state tax returns (unless prepared here)

Income Information

- Profit & Loss statement, Balance Sheet if available
- All income for the rental, including cash, credit cards, and other direct payments
- Any 1099-MISC forms received
- Interest income (Form 1099-INT, 1099-OID)

Expense Information

- Advertising expense
- Vehicle year and make used for rental, mileage for rental, total mileage put on vehicle
- Cleaning and maintenance expense
- Contract labor paid, copy of 1099-NECs issued
- Insurance expense
- Legal and professional fees (ex: LLC fees, tax preparation fees)
- Management fees
- Interest expense (mortgage, business loans, credit cards used for business)
- Repair expense
- Supplies expense
- Real estate taxes paid
- Utilities, cell phone, internet expenses
- Depreciation schedule (unless prior return prepared here)
- Purchase information if new rental (settlement statement from closing)
- Sale information if sold (Form 1099-S, settlement statement from closing)