

Landlord Income and Expense Spreadsheet - Returning Client

Note: We do not need to see actual receipts or statements. HOWEVER - you must have these documents if your return is examined by the IRS or your state taxing authority.
 If you are not sure how to read a particular document, please bring it to us!

General Info and Income

Property address:

1. Dates the property was a rental during the tax year: _____ to _____
2. Number of days you used the property for personal use during the tax year: _____
3. **Total rent collected for the year:** _____

Expenses

- Advertising
- Cleaning and Maintenance
- Commissions Paid
- Insurance
- Legal and Professional Services
- Property Management Fee
- Mortgage Interest
- Repairs
- Supplies
- Real Estate Taxes
- Utilities
- Other (list below)

Travel Expenses:

- Year and type of vehicle used to visit property: _____
- Total miles associated with rental property: _____
- Year vehicle was placed in service: _____
- Other Travel Expenses: _____

If you have filled in an amount in the "other expenses" category above, list the items here.

	<u>Cost</u>	<u>Description</u>	<u>Cost</u>	<u>Description</u>
1			4	
2			5	
3			6	

Documents that will be helpful

- Depreciation Schedule from the previous year*
- Settlement Statement / HUD-1 from the purchase of the property
- *if this is not the first year the property was in service as a rental and you didn't use PIM Tax last year

If you have any further questions, email us at admin@pimtax.com