

Landlord Income and Expense Spreadsheet - SOLD Property

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. Date you purchased the property:
2. Date you lived in it as a primary residence: _____ to _____
3. Type of Property:
4. Date you first held the property out for rent:
5. Number of days you used the property for personal use during the year:
- 6. Total rent collected for the year:**
7. Date you SOLD the property:

Expenses

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

*Settlement Statement /ALTA or HUD-1 from the purchase of the property