

## Landlord Income and Expense Spreadsheet - New to PIM

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	Expenses
<p><b>Property address:</b></p> <p>1. Date purchased:</p> <p>2. Dates lived in as primary residence: _____ to _____</p> <p>3. Type of property:</p> <p>4. Date first available for rent:</p> <p>5. Dates property was rental during tax year: _____ to _____</p> <p>6. # of days of personal use during tax year:</p> <p>7. <b>Total rent collected for the year:</b></p>	<p>Advertising</p> <p>Cleaning &amp; Maintenance</p> <p>Commissions Paid</p> <p>Insurance</p> <p>Legal and Professional services</p> <p>Property Management Fee</p> <p>Mortgage Interest</p> <p>Repairs</p> <p>Supplies</p> <p>Real Estate Taxes</p> <p>Utilities</p> <p>Other (listed below)</p>

**Travel Expenses:**

Year & 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\*

ALTA/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