

RENTAL PROPERTY INCOME TAX ORGANIZER

This is a guide intended to assist you in preparing for income tax filing.

It does not necessarily include everything that may be applicable in your specific situation.

We need a copy of your last filed income tax return (if we did not prepare it) and a recent notice of assessment or reassessment.



**ZOE KLEIN
& COMPANY**

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ACCOUNTING SERVICES

RENTAL INFORMATION:

Your Name:

Address of Rental Property:

of rental units in the property:

List Name	Address	Sin # Of Any Partners:
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.....
.....
.....

Do you live in any portion of the property? Yes No

Percentage occupied for personal use:

Rents received during the year:

EXPENSES:

- Utilities (heat, hydro, water, oil)
- Insurance
- Mortgage interest
- Other interest and bank charges
- Office supplies (paper, receipt books etc)
- Property Manager fees
- Repairs, maintenance (includes cleaning supplies)
- Property tax
- Security system

If you travel to your rental property to manage it you can claim transportation costs – including a portion of your vehicle operating costs if you own a car. Be sure to tell us and save your receipts for transportation costs.