

RENTAL PROPERTY INCOME
TAX ORGANIZER



ZOE KLEIN
& COMPANY

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ACCOUNTING SERVICES

RENTAL INFORMATION:

Your Name: _____

Address of Rental Property: _____

of rental units in the property: _____

Owner Name: _____ Address: _____ Sin # Of Any Partners: _____

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.

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.