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2023 Rental Income

Please complete this form to report Rental income and expenses. Additional forms can be printed from our website at: www.churchwelltax.com/resources or give us a call and we will be happy to send you more.

1. Rental Information

Property Details	
Please complete a separate worksheet for each renatl property	
Owner Name	
Owner Phone Number	
Type of Property:	
Single Family Residence	☐Multiple Family Residence
☐ Vacation Property	☐ Commercial
☐ Bare Land	
Address	
Number of Days Rented	
Number of Personal Use Days	
% of Ownership	
2 Accots & Im	nrovomonts

2. Assets & Improvements

On a separate sheet, please provide a list of all rental assets & improvements. Please include:

- Assets acquired or major repairs/improvements made during this tax year.
 Indicate date, amount paid, and any trade-in.
- Assets disposed of in this tax year.

Indicate any gain or loss on the asset sale, or if asset was "junked."

• Prior Depreciation.

For new clients, please provide the depreciation report from your last year's tax return, including detailed asset list and asset life history.

3. Additional Requirements

Please provide copies of the following documents if applicable:

- Balance Sheet for tax year, with prior year comparison
- Profit & Loss for tax year
- Complete General Ledger, formatted for 1 page wide.
- Forms 1099 issued
- Forms 1099 received
- Any notices received from Tax Agencies for the tax year

4. Income & Expenses

A. Income
Rents Received
Other Income
2.5
B. Expenses
Advertising
Auto Complete section 5
Travel
Airfare, Train, Etc.
Lodging
Auto Rental, Bus, Taxi, Etc.
Out of Town Laundry
Cleaning & Maint.
Commissions
Insurance
Professional Fees
Management Fees
Mortgage Interest
Other Interest
Repairs
Supplies
Real Estate Taxes
Other Taxes
Utilities
Other (Specify):

5. Vehicle Expense Additional Notes Indicate Vehicle Expenses related to rental operations Vehicle 1 Vehicle Make/Model/Year Date Purchased Beginning/Ending Mileage for Year Total Miles (Including Personal) Rental Related Miles Yes ☐ No Is the vehicle leased? ☐ No ☐ Yes Do you have written records to support use? ☐ No ☐ Yes Was another vehicle available for personal use? Cost of Fuel, Repairs & Maintenance Cost of Insurance, Licence & Fees Vehicle 2 Vehicle Make/Model/Year Date Purchased Beginning/Ending Mileage for Year Total Miles (Including Personal) Rental Related Miles ☐ No ☐ Yes Is the vehicle leased? □ No ☐ Yes Do you have written records to support use? ☐ No ☐ Yes Was another vehicle available for personal use? Cost of Fuel, Repairs & Maintenance Cost of Insurance, Licence & Fees 6. Signature We will complete your return based on the information provided. We will not be able to complete returns where we have reasonable suspicion that the information provided is intentionally incomplete or inaccurate.

If you are having problems providing accurate financial statements, bookkeeping services are available for an additional fee.

To the best of my knowledge, all of the information contained within this document is true, correct, and complete.

Sign:
Date: