

# CODE- 4 TAX SERVICES

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## RENTAL PROPERTY DEDUCTIONS FOR TAX YEAR: \_\_\_\_\_

This form is to be used in conjunction with the General Information Worksheet. Please complete all information as thoroughly as possible. If sending supporting documentation, send photocopies only. Keep all receipts and documentation used to prepare this form in a safe location for 5-7 years. Please write legibly. Use separate sheet if needed.

ADDRESS OF PROPERTY: \_\_\_\_\_

NEW RENTAL PROPERTY? Y N

DISCONTINUED/SOLD RENTAL PROPERTY THIS YEAR? Y N

Type of Property: Single Family Residence

Multi-Family Residence

Vacation/Short-term

Commercial

Land

Self-Rental

Other: \_\_\_\_\_

PROPERTY VALUE WHEN PROPERTY WAS PURCHASED/SERVICE START DATE AS A RENTAL: \_\_\_\_\_

LAND VALUE AT PURCHASE/SERVICE START DATE AS RENTAL: \_\_\_\_\_ Percent Ownership: \_\_\_\_\_

(This value can be found on the property tax bill or purchase documents.)

### INCOME

Rent received \_\_\_\_\_

Other income \_\_\_\_\_

Major Repairs (structural repairs, remodeling, new fixtures or appliances, landscaping, hardscaping, etc.):

List individually with cost & date:

Did you make payments requiring 1099's? Y N

If yes, were required forms filed? Y N

### EXPENSES

Advertising \_\_\_\_\_

Cleaning and maintenance \_\_\_\_\_

Commissions \_\_\_\_\_

Insurance \_\_\_\_\_

Legal & professional services \_\_\_\_\_

Management Fees \_\_\_\_\_

Home Owners/Association dues \_\_\_\_\_

Mortgage Interest paid \_\_\_\_\_

Property Taxes paid \_\_\_\_\_

Other interest \_\_\_\_\_

General Repairs \_\_\_\_\_

Supplies \_\_\_\_\_

Utilities:

Gas \_\_\_\_\_

Water \_\_\_\_\_

Electricity \_\_\_\_\_

Internet/Cable \_\_\_\_\_

Trash \_\_\_\_\_

Gardener \_\_\_\_\_

Postage \_\_\_\_\_

Other \_\_\_\_\_

Did you use this property for personal use? Y N

If Yes, was it longer than 14 days total? Y N

Or 10% of the total days rented out? Y N

Property foreclosed/short sold? Y N

If Yes, attach copy of 1099-C or A.

Original purchase price \_\_\_\_\_

Original purchase date \_\_\_\_\_

Short sale price \_\_\_\_\_

Closing date \_\_\_\_\_

Costs associated with closing \_\_\_\_\_

Was this property ever your primary residence?

Y N

If Yes, what dates? From \_\_\_\_\_ to \_\_\_\_\_

### AUTO/TRAVEL EXPENSES

Miles round trip to property \_\_\_\_\_

Number of trips to property \_\_\_\_\_

Travel expenses to property \_\_\_\_\_

(airfare, hotel, rental vehicles, etc.)

**Code-4 Tax Services e-file & payment policy:** Returns will be e-filed at no extra charge. E-files will not be submitted until signed acknowledgment & payment are received. Payment can be made by cash, check, Visa, Mastercard, Discover, American Express or Square Cash transfer. Mail-in Clients: a secure pay link will be sent to you if you prefer to pay by credit card.