



# Cannon Tax & Accounting, Inc.

## Rental Property Worksheet

Client ID #

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[www.cannonadvisors.com](http://www.cannonadvisors.com)

Cannon Tax & Accounting, Inc.

This worksheet is designed for those that receive income from a Rental Property.

~~~ Please use a separate worksheet for each additional property. ~~~

**Physical Address of Property:** (address, street, city, state, zip)

**Type of Property:**

Single Family Residence     Vacation/Short Term Rental     Land     Self Rental  
 Multi-Family Residence     Commercial     Royalties     Other (describe)

**General Info:**

Number of Days Rented (if not 365) \_\_\_\_\_

Number of Days for Personal Use (if not rented entire year) \_\_\_\_\_

% of Ownership (if not 100%) \_\_\_\_\_ %

If this is a new rental property - please provide the information below:

Date Purchased \_\_\_\_\_

Date Became a Rental \_\_\_\_\_

Purchase Amount    ➔    Building \$ \_\_\_\_\_    Land \$ \_\_\_\_\_

Were Payments Made that Require Form(s) 1099  
to be filed :    Y \_\_\_\_\_    N \_\_\_\_\_

**Income:**

Total Rent Received For The Year    \$ \_\_\_\_\_

**Expenses:**

|                               |          |                    |          |
|-------------------------------|----------|--------------------|----------|
| Advertising                   | \$ _____ | Supplies           | \$ _____ |
| Travel                        | \$ _____ | Real Estate Tax    | \$ _____ |
| Cleaning and Maintenance      | \$ _____ | Utilities          | \$ _____ |
| Commissions                   | \$ _____ | Security           | \$ _____ |
| Insurance                     | \$ _____ | Refinancing Points | \$ _____ |
| Legal / Professional Fees     | \$ _____ | Other:             |          |
| Management Fees               | \$ _____ | Waste Removal      | \$ _____ |
| Mortgage Interest (Form 1098) | \$ _____ | Yard Maintenance   | \$ _____ |
| Other Mortgage Interest       | \$ _____ | Pest Control       | \$ _____ |
| Qualified Mortgage Insurance  | \$ _____ | HOA Dues           | \$ _____ |
| Repairs                       | \$ _____ | Other              | \$ _____ |

**Mileage:** (any miles to / from the property weather to check on it, pick up rent, maintenance & repairs....)

Total Mileage on Vehicle for Year..... \_\_\_\_\_  
Total Miles Driven for Rental..... \_\_\_\_\_  
Vehicle Make..... \_\_\_\_\_  
Vehicle Year..... \_\_\_\_\_

Mileage Log    Yes \_\_\_\_\_    No \_\_\_\_\_

**Note :** Bring your invoices, bank/CC statements, receipts, etc so we may properly prepare your return.