

Silva Tax Group

355 Third Avenue, Suite 101
Chula Vista, CA 91910
Tel: (619) 363-7420
Web: www.silva.tax
Property owner name: _____

RENTAL ORGANIZER

Use for your residential or commercial rental property for your individual (Schedule E) or business (LLC, S Corp or partnership) tax returns

Property location and address: _____

EIN or SSN: _____

Tax year: _____

Indicate Property Type:

- ☐ Single Family Residential
☐ Multi-Family Residential
☐ Vacation/Short-Term
☐ Commercial
☐ Land

Indicate Property Ownership:

- ☐ Taxpayer ☐ Spouse ☐ Joint
☐ Partnership or LLC ☐ S Corporation

Issuance of 1099 to Service Providers:

- ☐ Pay \$600 or more to service provider?
☐ Did you give 1099 to non-incorporated providers?

Were you actively involved in the management of the rental activity of this property? ☐ No ☐ Yes

Is the owner(s) a real estate professional? ☐ No ☐ Yes ☐ Unsure if I qualify, please discuss with us

To be a real estate professional, more than half of your work time must be in the profession and you must work more than 750 hours in a real property trade or business as a self-employed individual or as the owner of a business entity.

Was this property used during the year for personal purposes by the owner or owner's family, or by the owner's business? ☐ No ☐ Yes

If used for personal purposes - indicate number of days used personally: _____ & indicate number of days rented: _____

Rental Income (net of sales tax collected, if applicable) \$ _____

Expenses

Advertising	\$	_____
Automobile & travel	\$	_____
Cleaning and maintenance	\$	_____
Commissions	\$	_____
Insurance	\$	_____
Accounting & tax preparation	\$	_____
Legal & other professional	\$	_____
Management fees	\$	_____
Mortgage interest paid to banks (Form 1098)	\$	_____
Other interest	\$	_____
Repairs	\$	_____
Supplies	\$	_____
Taxes - real estate	\$	_____
Taxes - other	\$	_____
Utilities	\$	_____
Association dues (regular, non-capital)	\$	_____
Other expenses (list):		
_____	\$	_____
_____	\$	_____
_____	\$	_____
_____	\$	_____
_____	\$	_____

Provide a copy of the closing statement & a list of all the improvements made to the property after you purchased it if

- ☐ you acquired a rental property during the year or
☐ you converted a property to rental use during the year.

Date Placed in service: _____
(available for rent)

RENTAL PROPERTY IMPROVEMENTS

If you spend money on improvements to an existing rental property during the year, provide details below:

Description	Date	Cost
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

DEPRECIATION: provide depreciation schedules from the prior year if we did not prepare your return for that year.

☐ If you sold any rental properties during the year, provide copies of the closing statements from the sale of and from the purchase of the property and a detailed list of all improvements made to the property during your ownership.