

Rental Income Checklist

Personal Information			
Full Name			
Property Address			
Type of Ownership	<input type="checkbox"/> Sole-Proprietorship/Co-Ownership		<input type="checkbox"/> Partnership
% of Ownership		% for Personal Use	
Did you purchase the property during the year?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
Did you dispose of the property during the year?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
Details of Co-Owners & Partners			
Full Name		% of Ownership	
Full Name		% of Ownership	

Rental Income		
√	Income (Total Income – Do Not Prorate)	\$
<input type="checkbox"/>	Rental Income	

Rental Expenses

√	Expenses (Total Expenses – Do Not Prorate)	\$
<input type="checkbox"/>	Advertising	
<input type="checkbox"/>	Insurance	
<input type="checkbox"/>	Mortgage Interest (provide Mortgage Statement from Lending Company)	
<input type="checkbox"/>	Office Expenses	
<input type="checkbox"/>	Legal, Accounting & Professional Fees	
<input type="checkbox"/>	Management & Administration Fees	
<input type="checkbox"/>	Repairs & Maintenance	
<input type="checkbox"/>	Property Taxes	
<input type="checkbox"/>	Travel Expenses	
<input type="checkbox"/>	Heat	
<input type="checkbox"/>	Electricity	
<input type="checkbox"/>	Water	
<input type="checkbox"/>	Condominium Fees	
<input type="checkbox"/>	Automobile Expenses (more than 1 rental property)	
<input type="checkbox"/>	Cable TV & Internet Fees	
<input type="checkbox"/>	Security	
<input type="checkbox"/>	Landscaping & Snow Removal	
<input type="checkbox"/>	Bank Fees	
<input type="checkbox"/>	Other -	
<input type="checkbox"/>	Other -	

Other Details

√	Please also provide the following documents:
<input type="checkbox"/>	Mortgage Statement (may be obtained from Lending Company)
<input type="checkbox"/>	Statement of Adjustment (may be obtained from your Lawyer)
<input type="checkbox"/>	Major Renovation & Home Improvement Receipts

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