



HOLDEN ACCOUNTING SERVICES, LLC

TAXES • BOOKKEEPING • PAYROLL • IN-PERSON • REMOTE • PICK-UP

Rental Questionnaire

Property address

Was this property rented all year?	Yes	No	If no, please answer the questions below:
Date first available for rent (mm/dd/yyyy)			
Date occupied (began rented) (mm/dd/yyyy)			

List number of days of any personal use

Property Description

If this is a multi-unit building and you live in a portion of the unit please list SQ ft. personal use and SQ ft rental use.

Personal use SQ ft.	Rental use SQ ft.
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Total Income before expenses (rent or lease):

Expenses Paid by you			
Management Fees		Plumbing	
Advertising		Electrical	
Homeowner Association Dues (HOA)		Legal or Professional fees	
Cleaning		Repairs ①	
Commissions		Improvements ② – Itemize below	
Insurance		Supplies	
Licenses/Permits		Taxes (Property Taxes, GE)	
Gardening/Landscaping		Wages/Salaries	
Painting		Interest	
Pest Control		Travel (if travel is listed please complete the worksheet below in this questionnaire)	
Mortgage interest – what you’ve paid to your bank/lender (include Form 1098)		Other Expenses (Please List)	
Utilities (Only list if you pay the utilities - Gas/Water-Sewer/Garbage/Phone/Internet)		Other Expenses (Please List)	

Office use - Sum Exp:

① *Repairs result in prolonging the life of assets already included in the property* - such as repainting, fixing gutters, replacing broken windows, fixing leaky faucets or clogs, etc. **Include receipts.**

② *Improvements result in the betterment of property* – such as Room additions or expansions, remodeling, replacing the roof, putting in new furniture or appliances, Installing new carpet or other flooring, etc. Itemize below. **Include receipts.**

Business Vehicle Information			
Year (Four digit year)		Purchase Price	
Make		Total Miles	
Model		Personal Miles	
Date Vehicle Began Business Use (mm/dd/yyyy)		Business Miles	

Additional Business Vehicle Information (ONLY FILL THIS OUT IF REQUESTED BY OUR OFFICE)			
Lease cost		Auto Insurance	
License Plates Cost		Registration Fees	
Gasoline & Oil		Vehicle loan interest	
Repairs, Tires, Car Washes			

Other Travel Costs ③			
Airfare		Parking	
Bus/Train/Taxi Fares		Tolls	
Lodging		Meals	

③ Travel must be mostly related to rental property activities for costs to be deductible. Costs incurred while traveling for repairs, improvements, meeting with potential renters, etc. if reasonable, are generally deductible. Travel costs incurred while on vacation, even if incidental to visiting and making repairs or improvements on the property, are not generally deductible. For example, Airfare for two people and multiple days' lodging would not be a reasonable expense for replacing broken window. Please contact our office with any questions.

Additional notes/comments:

I certify that I have filled out this form accurately and would like my taxes prepared according to the information I provided above.

Signature:

Date:
(mm/dd/yyyy)