



Ron Harris, CPA

Real Estate Tax Checklist

For Tax Year:

2018

Please complete a separate copy of this checklist for each property you owned in 2018

If you owned rental properties and/or land, please provide the following information for each property. Please include the **Settlement Statement** for the purchase and/or sale along with any 1099's (1099-A, C, or S)

GENERAL INFORMATION - ACQUISITION

Property address: _____

Description of property (condo/house/duplex/vacation) _____

Did you spend 750 hours or more managing rental properties in 2018? Y-Yes, N-No _____

Purchase price \$ _____ Date of Purchase _____

Closing Costs paid at purchase \$ _____

Amount Spent on Landscaping/Pool \$ _____

Amount Spent on Interior Improvements \$ _____

RENTAL INCOME

Rental Income from records and/or 1099-Misc \$ _____

Number of months or days rented in 2018 _____

RENTAL EXPENSES

Advertising	\$ _____	Permits/Licenses	\$ _____
Automobile Expense	\$ _____	Pest Control	\$ _____
Cleaning/Janitorial	\$ _____	Plumbing	\$ _____
Commissions - Realtor	\$ _____	Prop. Management	\$ _____
Homeowners' Association Dues	\$ _____	Real Estate Taxes	\$ _____
Insurance - Landlord's	\$ _____	Repairs	\$ _____
Insurance - Home Warranty	\$ _____	SID/LID Fees	\$ _____
Landscaping/Lawn Service	\$ _____	Supplies	\$ _____
Legal and Professional Fees	\$ _____	Telephone	\$ _____
Maintenance (Pool, HVAC, Other)	\$ _____	Travel	\$ _____
Mortgage Interest (Form 1098)	\$ _____	Utilities	\$ _____
Other Interest	\$ _____	Other Costs	\$ _____

