

CLIENT NAME: _____ **Tax Year:** _____

RENTAL ADDRESS: _____
 (Incl Postal Code) _____

Is this rental part of your Home? Y N _____ (Please provide square footage details) _____ / _____

Is this the FIRST or FINAL year of Rental? Y N _____ (Please provide purchase / sale documents) _____

Is this only a rental for part year? Y N _____

Has there been a change of use? Y N _____

Is the income shared with your Spouse or Others? Y N _____

Rental Income: _____

(Did you receive or pay a Security Deposit?) Y N _____

Advertising _____

Insurance _____

Interest _____

Legal & accounting _____

Management _____

Maintenance & repairs _____

Property taxes _____

Travel _____

Utilities _____

Other: _____

Notes: _____

