

**CLIENT NAME:** \_\_\_\_\_ **Tax Year:** \_\_\_\_\_

**RENTAL ADDRESS:** \_\_\_\_\_  
(Incl Postal Code) \_\_\_\_\_

**NEW \*** Are you renting on short term basis? (AirBnB / VRBO etc) Y N \_\_\_\_\_

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 \_\_\_\_\_

Have you started or stopped renting since last year? 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:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_