



Ron Harris, CPA

Real Estate Tax Checklist

For Tax Year: **2019**

Please complete a separate copy of this checklist for each property you owned in 2019

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 2019? 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 2019 _____

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 \$ _____

