

Rental Property Checklist

Rental income, property expenses, mortgage statements, repairs and asset information.

Use this checklist to gather documents for rental real estate reported on your tax return.

PROPERTY INFORMATION

- ☐ Property address
- ☐ Date purchased
- ☐ Purchase price
- ☐ Closing statement
- ☐ Date placed in service as a rental
- ☐ Ownership percentage
- ☐ Number of rental days
- ☐ Number of personal-use days
- ☐ Prior-year depreciation schedule

RENTAL INCOME

- ☐ Total rent received
- ☐ Security deposits kept as income
- ☐ Late fees
- ☐ Application fees
- ☐ Insurance reimbursements
- ☐ Other property income
- ☐ Form 1099-K or other income forms

RENTAL EXPENSES

- ☐ Advertising
- ☐ Cleaning and maintenance
- ☐ Commissions
- ☐ Insurance
- ☐ Legal and professional fees
- ☐ Management fees
- ☐ Mortgage interest
- ☐ Property taxes
- ☐ Repairs
- ☐ Supplies
- ☐ Utilities
- ☐ HOA fees
- ☐ Landscaping
- ☐ Pest control
- ☐ Travel related to the property
- ☐ Other rental expenses

IMPROVEMENTS & ASSETS

- ☐ Appliances
- ☐ Furniture
- ☐ Flooring
- ☐ Roof replacement
- ☐ HVAC system
- ☐ Remodeling
- ☐ Major plumbing or electrical work
- ☐ Purchase date and cost of each improvement

MORTGAGE & FINANCING

- ☐ Form 1098
- ☐ Year-end mortgage statement
- ☐ Loan interest paid
- ☐ Refinancing documents
- ☐ Home equity loan information related to the property

PROPERTY SALE (IF APPLICABLE)

- ☐ Closing statement from the purchase
- ☐ Closing statement from the sale
- ☐ Sales price
- ☐ Selling expenses
- ☐ Improvement records
- ☐ Prior depreciation schedule
- ☐ Date the property stopped being rented

Important: Upload documents through the secure ServiAmigo client portal. Do not send Social Security numbers, identification documents, tax forms or bank information through regular email, text message or WhatsApp.