

RENTAL INFORMATION SHEET

Client name:

Rental property address:

Date property was purchased**

**If the property was purchased in 2018, please provide all purchase documents

Was the rental property sold in 2018?

YES / NO

If YES, please provide all sale and original purchase documents

Was the property your personal residence
prior to being rented?

YES / NO

If YES, please provide assessment of fair market value of the property
at the time it was changed to a rental \$ _____

Do you have plans to reside in the rental
property in the future?

YES / NO

Is there any personal use of the property ?

YES / NO

If YES, the % personal use _____

Is the property a partnership?

YES / NO

If YES, your % _____

Do you want to depreciate the building?

YES / NO

Total for the year

Rental Income

\$ _____
\$ _____

Expenses

Total for the year

Advertising \$ _____
Property insurance \$ _____
Interest (no principle portion of payments) \$ _____
Office supplies and expenses \$ _____
Legal and accounting fees \$ _____
Administration & management fees \$ _____
Maintenance & repairs (no asset purchases) \$ _____
Salaries, wages & benefits \$ _____
Property taxes \$ _____
Travel expenses:
 Accommodations/lodging \$ _____
 Meals \$ _____
Utilities: Heat \$ _____
 Electricity \$ _____
 Water and sewer \$ _____
Condo/strata fees \$ _____
Other fees (describe): \$ _____
\$ _____

Automobile Expenses:

Year/make/model of vehicle used to earn rental income _____
Year purchased: _____
Purchase price: \$ _____
Current value: \$ _____
Kms driven for during the year to earn rental income _____
Total kms driven during the year _____

<u>Expenses</u>	<u>Total for the year</u>
Fuel	\$ _____
Maintenance and repairs	\$ _____
Insurance	\$ _____
Licensing/registration	\$ _____
Loan interest (no principle)	\$ _____
Lease payments	\$ _____
Parking	\$ _____
Autoclub (AMA, etc)	\$ _____
Other fees (describe):	\$ _____
	\$ _____

Major purchases: items over \$500 (net of GST) and with a life expectancy exceeding 1 year
OR major repairs/renovations to the property

<u>Description of item purchased</u>	<u>Purchase price</u>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____