

Rental Property Tax Organizer 2025 Tax Year



RENTAL PROPERTY ADDRESS: _____

City, State, Zip _____

Nickname (if you use one) _____

Yes No

Is this new or has this rental changed from your 2024 tax return?

(Type of renters, Frequency, square footage, etc.)

If yes, please provide details on a separate page.

Was this rental in effect for the full year?

If not, dates as a rental? _____ to _____

Was the rental space used personally more than a total of 14 days?

If yes, how many? _____

Did you participate in the rental activity for 250 hours or more?

(this is to determine if it qualifies as a "business" for sake of the potential 199A deduction – passive rentals do not)

Did you have travel related to this rental (flights, hotels, rental car)?

Total amount paid _____

Did you have mileage related to this rental?

Total miles driven on the vehicle during the year _____

RENTAL only miles _____

NOTES:

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Rental Property Address _____

Please provide TOTAL for the year, I will calculate applicable % if required.

	Yearly Total	Notes
Rent Received	_____	_____
Security or Pet Deposits Received	_____	_____

IRS Suggested Expense Categories

Advertising	_____	_____
Cleaning	_____	_____
Commissions Paid	_____	_____
Mortgage Insurance (PMI)	_____	_____
Liability & Property Insurance	_____	_____
Legal & Professional Fees	_____	_____
Management Fees	_____	_____
Mortgage Interest (Include 1098)	_____	_____
Repairs & Maintenance	_____	_____
Supplies	_____	_____
Real Estate Taxes PAID in 2025	_____	_____
Sales Tax	_____	_____
Utilities	_____	_____

Other Common Expenses

Association Dues	_____	_____
Licenses & Permits	_____	_____
Pest Control/Security	_____	_____
Telephone	_____	_____
Tenant Gifts (Up to \$25/person)	_____	_____
Travel	_____	_____
Meals for travel or meetings	_____	_____
Guest Breakfast/Amenities	_____	_____
Major Home Improvements (over \$2500)	_____	_____
Security or Pet Deposits returned	_____	_____
Other _____	_____	_____
Other _____	_____	_____