

___ 1-FAM ___ 2-FAM ___ 3-FAM ___ 4-FAM

HOMEOWNER

YEAR _____

Thank you for allowing us to prepare your tax return.

NAME: _____ FEDERAL ID _____

RESIDENCE: _____

PROPERTY ADDRESS _____

In order to better serve you, please provide us with the following data and forms:

Forms and Documents:

HUD and Settlement Statement (New)	Documents	
Mortgage Interest	1098-Mortg	
Bank Interest	1099-Int	

Please complete 1 page per property:

Purchase Date? (New Property/New Client): ___/___/___

Purchase Cost: \$ _____ Closing Cost: \$ _____

How many units are rented? ___ And for how long?

1st Unit: _____ # months rented? _____ = \$ _____

2nd Unit: _____ # months rented? _____ = \$ _____

3rd Unit: _____ # months rented? _____ = \$ _____

4th Unit: _____ # months rented? _____ = \$ _____

1- 1099-Misc rents received: ----- \$ _____

2- Cash rent received: ----- \$ _____

3- Advertising: ----- \$ _____

4- Auto Expenses: ----- \$ _____

5- Cleaning and Maintenance: ----- \$ _____

6- Mortgage Interest 1098-Mortg:----- \$ _____

7- Mortgage Interest on Addt Loans : ----- \$ _____

8- RE Taxes: ----- \$ _____

9- Homeowners Insurance: ----- \$ _____

10- Legal/other Professional Fees.: ----- \$ _____

11- Repairs: ----- \$ _____

12- Supplies: ----- \$ _____

13- Capital Improvements: ----- \$ _____

14- Electricity, *only if included in rental*: ----- \$ _____

15- Gas/Oil, *only if included in rental*: ----- \$ _____

16- Water/Sewer: ----- \$ _____

17- Excise Tax: ----- \$ _____

I certify this information to be true and accurate.

Signature: _____

Date _____