



**KAPLAN MANAGEMENT CONSULTANTS, INC  
RENTAL PROPERTY INFORMATION SHEET TAX  
YEAR 2023**

***\*PLEASE COMPLETE ENTIRETY OF THIS WORKSHEET (IF APPLICABLE)  
\*RETURNS WILL NOT BE PREPARED WITHOUT A COMPLETED WORKSHEET***

PROPERTY ADDRESS \_\_\_\_\_

VALUE OF HOUSE (IF NEW RENTAL) \$ \_\_\_\_\_ DATE PURCHASED \_\_\_\_\_

DID YOU MAKE ANY PAYMENTS IN 2023 THAT WOULD REQUIRE YOU TO FILE FORM(S) 1099?

YES  NO

IF YES, DID YOU OR WILL YOU FILE REQUIRED FORM(S) 1099? YES  NO

**INCOME**

TOTAL RENTS RECEIVED \$ \_\_\_\_\_

**EXPENSES (WHOLE \$ AMOUNTS)**

ADVERTISING \$ \_\_\_\_\_ COMMISSIONS \$ \_\_\_\_\_

INSURANCE \$ \_\_\_\_\_ MORTGAGE INTEREST \$ \_\_\_\_\_

LEGAL/PROFESSIONAL FEES \$ \_\_\_\_\_ REAL ESTATE TAXES \$ \_\_\_\_\_

CLEANING/MAINTENANCE \$ \_\_\_\_\_ SUPPLIES \$ \_\_\_\_\_

MANAGEMENT FEES \$ \_\_\_\_\_ REPAIRS \$ \_\_\_\_\_

TELEPHONE \$ \_\_\_\_\_ AUTO/TRAVEL EXPENSES \$ \_\_\_\_\_

UTILITIES (ELEC., GAS, WATER) \$ \_\_\_\_\_ MAJOR RENOVATIONS \$ \_\_\_\_\_

OTHER EXPENSES (PLEASE LIST):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I UNDERSTAND THAT IF REQUESTED BY FEDERAL OR STATE TAXING AUTHORITIES, I WILL HAVE TO PRODUCE RECEIPTS TO SUBSTANTIATE MY DEDUCTIONS.**

\_\_\_\_\_  
CLIENT SIGNATURE

\_\_\_\_\_  
CLIENT NAME

\_\_\_\_\_  
DATE