

ROGER LAMBERSON, PLC
725 W ELLIOT RD, STE 101-8
GILBERT, AZ 85233
(480) 591-1002

RENTALS & ROYALTY WORKSHEET

Rental & Royalty Information and Description:			Type of Property:	
Address:			Type	1. Single Family Residence
Property A:				2. Multi-Family Residence
Property B:				3. Vacation/Short-Term Rental
Property C:				4. Commercial
Property D:				5. Land
Look at last year's return and use the same order A,B,C!				6. Royalties
Did you make payments requiring you to file 1099 forms?	Yes	No		7. Self-Rental
If "yes" did you or will you file all required 1099 forms?	Yes	No		8. Other (describe)

(Bring in "Settlement Statements" (Hud-1) on New Purchases, Sales and Refinances)						
Use this section for purchases and selling only!	Property A	Property B	Property C	Property D		
Purchase or Selling Price:	\$	\$	\$	\$		
Equipment or Improve. Cost:						
Closing or Refinance Cost:	\$	\$	\$	\$		
Accumulated Depreciation						
Land Cost/Sold						
Date Purchased or Sold:	/ /	/ /	/ /	/ /		
Fair Rental Days (365, 120 ?)	#	#	#	#		
Personal Use Days (0, 14, 30, 175 ?)	#	#	#	#		

Start Here	Rent Income and Expense Amounts:
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Total Rents or Royalties	\$	\$	\$	\$		
Monthly Rent Rate	\$ /Mo.	\$ /Mo.	\$ /Mo.	\$ /Mo.		
Advertising Expense	\$	\$	\$	\$		
Auto & Travel Exp.		Air line, Motel				
Business miles/Food	# /\$	# /\$	# /\$	# /\$		
Cleaning & Maintenance	\$	\$	\$	\$		
Commissions & Fees						
Insurance	\$	\$	\$	\$		
Mortgage Insurance						
Legal & Accounting Fees						
Management fees		Lender?		Lender?		
Mortgage Interest	\$	\$	\$	\$		
2 nd Mortgage						
Repair Cost	\$	\$	\$	\$		
Supplies						
Property Taxes	\$	\$	\$	\$		
Sales taxes						
Utilities - Electric	\$	\$	\$	\$		
Water, Gas & Etc.						
HOA-Association Dues						
Office Expenses		Bank Charges, Eq Rentals				
Depreciation & Depletion Etc.	\$	\$	\$	\$		