**How to use this form**
1. Open it on your phone or computer (iPhone: Files app or Adobe Acrobat Reader; Android: Google Drive or Acrobat).
2. Tap a box to type. Save the file. Every amount should come from a real record: receipt, invoice, bank or card statement.
Use one form for each property.

## 1. Property

Property address | City | State | ZIP

**Type:** ☐ Single-family ☐ Multi-family ☐ Condo / townhouse ☐ Short-term rental ☐ Commercial

Your ownership % | Date bought | Purchase price $ | Date first rented

Days rented at fair price in 2026 | Days used by you or family | Average guest stay (short-term, days)

## 2. Rental income

| | Amount $ | Records | | Amount $ | Records |
|---|---|---|---|---|---|
| Rents received | | ☐ | Income on Form 1099-K or 1099-MISC | | ☐ |
| Security deposits kept (not returned) | | ☐ | Other rental income (late fees, etc.) | | ☐ |

## 3. Expenses

| | Amount $ | Records | | Amount $ | Records |
|---|---|---|---|---|---|
| Advertising | | ☐ | Cleaning and maintenance | | ☐ |
| Commissions | | ☐ | Insurance | | ☐ |
| Legal and professional fees | | ☐ | Management fees | | ☐ |
| Mortgage interest (Form 1098) | | ☐ | Other interest | | ☐ |
| Repairs | | ☐ | Supplies | | ☐ |
| Property taxes | | ☐ | Utilities | | ☐ |
| HOA / condo fees | | ☐ | Platform fees (Airbnb, VRBO) | | ☐ |
| Lawn and pest control | | ☐ | Other (explain in notes) | | ☐ |

## 4. Improvements in 2026

*Improvements (new roof, A/C, addition, remodel) are recovered over time, not as repairs. Upload the invoices.*

| Description | Date finished | Cost $ | Paid to |
|---|---|---|---|
| | | | |
| | | | |

| Description | Date finished | Cost $ | Paid to |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

## 5. Questions

| | | |
|---|---|---|
| Did you sell or stop renting this property in 2026? | ☐ Yes | ☐ No |
| Do you (or your spouse) work more than 750 hours a year in real estate? | ☐ Yes | ☐ No |
| Do you take part in rental decisions (approving tenants, setting rent, repairs)? | ☐ Yes | ☐ No |
| Did you pay any contractor $2,000 or more for services? | ☐ Yes | ☐ No |

Notes

## Your confirmation

*I confirm that the information on this form is true and complete to the best of my knowledge, and that every amount comes from my own records, not from estimates. I will keep those records and give copies to G Tax Planners on request.*

Your name

Your signature (type your full name)

Date

Spouse name (if filing jointly)

Spouse signature

Spouse date