



Rental Questionnaire Client Name: \_\_\_\_\_ Tax Year: \_\_\_\_\_

Prop #	T S J O	Type	LLC/QJV Partner	Description Of Property and Location	Name On Deed	Name on Mortgage	Mort. Bal 12/31
1							
2							
3							
4							
5							

Code: T-Taxpayer S- Spouse J- Joint O – Other

Type: 1-Single Family 2- Multi Family 3- Vacation/ Short Term Rental 4- Commercial 5- Land 6- Royalties 7- Self Rental 8- Other

	1	2	3	4	5
Gross Rents: 1099's? __	\$	\$	\$	\$	\$
Other Income:					
Expenses:					
Advertising					
Auto/Travel (see back)					
Cleaning/ Maintenance					
Commissions					
Insurance					
Legal/ Professional					
Management Fees					
Mortgage Interest					
Other Interest					
Repairs: Plumbing					
Electrical					
Other:					
Supplies					
Taxes: Real Estate/Pers Property					
Utilities: Water					
Gas/ Electric					
Other: Trash					
Bank Charges					
# Days Prop. Available for rent @ FMV					
Use a Management Co.?	Y N	Y N	Y N	Y N	Y N
Active Passive Material Participation	A P M	A P M	A P M	A P M	A P M
Personal Use Percentage	%	%	%	%	%
Did you or any family member use it for personal purposes for more than 14 days or 10% of total days rented?					
Is this property a Vacation Rental?	Y N	Y N	Y N	Y N	Y N
If so, Total Days Rented					
Total Personal Use Days					
Is AVG Rental less than 7 Days	Y N	Y N	Y N	Y N	Y N
Interested in LLC with Fed ID #	Y N	Y N	Y N	Y N	Y N
Written Policy – Safe Harbor Election	Y N	Y N	Y N	Y N	Y N

