

Lockey & Pierce, CPA's, -- 2022 Tax Questionnaire
Certified Public Accountants And Financial Planners

Rental Property Checklist And Home Office Checklist

Type of property: _____ Location of property: _____

Rents collected: \$ _____

Mortgage, Taxes, Insurance

_____ Mortgage interest #1
 _____ Mortgage interest #2
 _____ Mortgage interest #3
 _____ Property tax
 _____ Mortgage insurance
 _____ Fire insurance

Repairs And Maintenance

_____ General maint. supplies
 _____ General repairs
 _____ Carpentry work
 _____ Concrete/masonry
 _____ Doors--interior/exterior
 _____ Electrical repairs
 _____ Fences/boundary
 _____ Heating systems
 _____ Landscaping
 _____ Lighting (interior, exter.)
 _____ Painting
 _____ Pest control
 _____ Plumbing work
 _____ Remodeling rooms
 _____ Roofing or gutters
 _____ Sidewalk/driveway
 _____ Siding--other exterior
 _____ Windows
 _____ Other: _____
 _____ Other: _____

Utilities

_____ Electric
 _____ Gas
 _____ Oil
 _____ Rubbish
 _____ Septic service
 _____ Sewer costs
 _____ Water expense
 _____ Well maint/repair

Equipment, Appliances, Tangibles

_____ Appliances
 _____ Carpeting/Flooring
 _____ Decorations
 _____ Fixtures
 _____ Furnace/boiler
 _____ Furniture
 _____ Laundry equipment
 _____ Lawn equipment
 _____ Outdoor furniture
 _____ Tools
 _____ Window treatments
 _____ Other: _____
 _____ Other: _____

Other Expenses

_____ Advertising
 _____ Burglar/fire alarm
 _____ Cleaning cost
 _____ Equipment rental
 _____ Legal fees
 _____ Rental comm/fees
 _____ Security
 _____ Service contracts
 _____ Telephone calls
 _____ Travel expenses
 _____ Other: _____

_____ **Total square footage**

_____ **Square footage used for rental or home office**

How many miles driven for managing, maintaining, repairing, etc., the real estate? _____

Notes And Comments: