



Client Information

Social Security Number	Full Name (as appears on SSN Card)	Tax Year	
Email Address	Phone Number	Date of Birth	
Spouse's SSN	Spouse's Name (as appears on SSN Card)		
Spouse's Email Address	Spouse's Phone Number	Spouse's Date of Birth	
Home Address	City	State	ZIP Code

Property 1

Property Address	City	State	ZIP Code	
Rents Received for Given Tax Year	Purchase Price Minus Land Value	Purchase Date		
Advertising	Auto Mileage	Cleaning	Insurance	Management Fees
Mortgage Interest	Repairs/Maintenance	Property Taxes	Utilities	
Improvements (Date & Cost)				

Property 2

Property Address	City	State	ZIP Code	
Rents Received for Given Tax Year	Purchase Price Minus Land Value	Purchase Date		
Advertising	Auto Mileage	Cleaning	Insurance	Management Fees
Mortgage Interest	Repairs/Maintenance	Property Taxes	Utilities	
Improvements (Date & Cost)				



Property 3

Property Address	City	State	ZIP Code
Rents Received for Given Tax Year	Purchase Price Minus Land Value	Purchase Date	
Advertising	Auto Mileage	Cleaning	Insurance
Mortgage Interest	Repairs/Maintenance	Property Taxes	Utilities
Improvements (Date & Cost)			

Property 4

Property Address	City	State	ZIP Code
Rents Received for Given Tax Year	Purchase Price Minus Land Value	Purchase Date	
Advertising	Auto Mileage	Cleaning	Insurance
Mortgage Interest	Repairs/Maintenance	Property Taxes	Utilities
Improvements (Date & Cost)			

Property 5

Property Address	City	State	ZIP Code
Rents Received for Given Tax Year	Purchase Price Minus Land Value	Purchase Date	
Advertising	Auto Mileage	Cleaning	Insurance
Mortgage Interest	Repairs/Maintenance	Property Taxes	Utilities
Improvements (Date & Cost)			