



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	Management Fees
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	Management Fees
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	Management Fees
Mortgage Interest	Repairs/Maintenance	Property Taxes	Utilities	
Improvements (Date & Cost)				