



Date: ____/____/____
DD/MM/YYYY

Address: _____

Name: _____

It will soon be time to prepare your ____ tax return. Providing complete and accurate information will allow us to prepare your tax return timely and efficiently. With this in mind, we have attached a checklist and questionnaire to assist you gathering the required items.

Your STATEMENT OF REAL ESTATE RENTALS

Please enter applicable amounts below and note any questions.

Complete a checklist for each rental property. DO NOT COMBINE.

Please provide copy of purchase or sale agreement as applicable.

Your Name: _____

Fiscal Period From: ____/____/____ To: ____/____/____
DD / MM / YYYY DD / MM / YYYY

Was this the final year of your rental operation?: ____Y/N

Address of property: _____

Business GST/HST registration #: _____ RT _____

Income

_____ Number of units

\$ _____ . _____ Gross Rent

Expense

_____ . _____ Advertising and Promotion (business cards, samples, flyers, awards, media)

_____ . _____ Insurance, including mortgage insurance

_____ . _____ Interest, mortgage or line of credit (do not include principle repayments)

_____ . _____ Office expenses

_____ . _____ Legal, accounting, and other professional fees

_____ . _____ Management and administration fees, property management fees

_____ . _____ Maintenance and repairs, provide a detailed list; some costs may be capital

_____ . _____ Property taxes

_____ . _____ Travel (taxi, bus, per Km reimbursement)

_____ . _____ Utilities (Heat, Hydro, water heater rental, propane, firewood, Internet, telephone)

Motor Vehicle Expenses (if multiple rental units are owned)

_____ Motor Vehicle - Make

_____ Motor Vehicle - Model

_____ YYYY Motor Vehicle - Year

___ / ___ / _____ Motor Vehicle - Date acquired (provide purchase agreement)

DD/MM/YYYY

_____ Km Motor Vehicle - Total Km driven in tax year

_____ Km Motor Vehicle - Business Use Km
(For each business trip, keep a log listing the following: date, destination, purpose, number of kilometres.)

_____ Km Motor Vehicle - Personal Use Km

_____ . _____ Motor Vehicle - Employer reimbursements for personal vehicle use

_____ . _____ Motor Vehicle - Fuel

_____ . _____ Motor Vehicle - Maintenance & repairs, (oil changes, car washes, etc.)

_____. _____ Motor Vehicle - Insurance / Roadside Assistance
_____. _____ Motor Vehicle - License & Registration
_____. _____ Motor Vehicle - Interest on vehicle loan (provide loan agreement)
_____. _____ Motor Vehicle - Leasing costs (provide lease agreement)

Assets Purchased

_____. _____ Appliances
_____. _____ Furniture
_____. _____ Land
_____. _____ Building

Signature: _____

Date: _____
Signing date DD/MM/YYYY

Please return completed form to:
Debbie Sitzer Professional Corporation, 9 - 250 Bayview Drive, Barrie, ON L4N 4Y8
Alternatively, scan and e-mail it to debbie@debbiesitzer.com