



RENTAL PROPERTY ORGANIZER

Property Information, Use & Rental Income

Complete one organizer for each rental property

2026

www.afairchildcpa.com | Upload completed organizer and supporting documents through the secure portal

Before you begin

Use one organizer per property. Provide supporting documents where applicable, including closing statements, Forms 1098 and 1099, property tax statements, and records for major purchases or improvements.

Property Information

Complete all applicable fields

Owner / Taxpayer Name							
Rental Property Address							
City		State		ZIP			
Property Type		Ownership %		Number of Units			
Date Acquired		Placed in Service		Date Sold (if applicable)			
Days Rented		Personal Use Days		Vacant / Available Days		Fair Rental Days	

Rental Income

Enter annual totals unless otherwise noted

Category	Amount
Gross rents received	
Advance rent received	
Security deposits retained as income	
Payments reported on Form 1099-K or rental platform statements	
Other rental income (parking, laundry, fees, reimbursements, etc.)	
Other income - describe in Notes	



RENTAL PROPERTY ORGANIZER

Operating Expenses

Complete one organizer for each rental property

2026

www.afairchildcpa.com | Upload completed organizer and supporting documents through the secure portal

Expense reminder

Enter only expenses related to this property. Keep receipts and supporting records. Costs that improve or extend the life of the property may need to be reported separately in the Improvements & Assets section rather than as repairs.

Rental Property Expenses

Enter annual totals unless otherwise noted

Category	Amount
Advertising / tenant placement	
Cleaning and maintenance	
Commissions / leasing fees	
Insurance	
Legal and professional fees	
Property management fees	
Mortgage interest (attach Form 1098, if received)	
Other interest	
Repairs	
Supplies	
Real estate taxes	
Other taxes / licenses / permits	
Utilities paid by owner	
HOA / condominium dues	
Landscaping / lawn care	
Pest control	
Travel / local transportation related to rental activity	
Other deductible expenses - describe in Notes	



RENTAL PROPERTY ORGANIZER

Improvements, Supporting Documents & Year-End Questions

Complete one organizer for each rental property

2026

www.afairchildcpa.com | Upload completed organizer and supporting documents through the secure portal

Improvements & Capital Purchases

List major purchases separately from repairs

Date	Description of Improvement / Asset	Cost

Additional Property Information

Business / rental miles driven

Total vehicle miles for year

Mortgage balance at year-end

Property tax paid

Year-End Questions

YES NO

Did you purchase, sell, exchange, or otherwise dispose of this property during 2026?

☐☐

Did you refinance the property or obtain a new loan during 2026?

☐☐

Was the property used personally by you, family members, or others for less than fair rental value?

☐☐

Was any portion of the property used as a short-term rental or rented through an online platform?

☐☐

Did you receive Form 1099-K, 1099-MISC, 1099-NEC, or other income reporting forms related to this property?

☐☐

Did you pay contractors or service providers for work that may require information reporting?

☐☐

Did the property experience casualty, theft, disaster, insurance proceeds, or condemnation activity?

☐☐

Documents to Include

Check the items you are providing

☐

Form 1098 / mortgage interest statement

☐

Property tax statement

☐

Closing Disclosure / settlement statement for purchase, sale, or refinance

☐

Rental platform / property management annual statement

☐

Forms 1099-K, 1099-MISC, 1099-NEC, or other income statements

☐

Invoices / receipts for major improvements and equipment

Notes / Additional Information