



## 2019 Rental Properties and Royalty Checklist

### Provide details for each property separately

- a.) Description and address of each property
- b.) Gross rents or royalty on each property
- c.) Gross expenses by category on each property
- d.) Copy of form 1098 Mortgage interest paid
- e.) Did you make payments to vendors which required 1099 reporting? \_\_\_\_\_ If yes did you file 1099? \_\_\_\_\_ (please provide copies)
- f.) If this is a new rental, please include the settlement statement from the purchase. Please provide an allocation of value between Land and Building (copy of assessed value on property tax statement or estimate)
- g.) If you sold a rental, please provide the settlement statement from both the original purchase and from the sale
- h.) If the rental property is not 100% rented, please provide details of % Rented and what the remaining use of the property is.
- i.) If you are not 100% owner of the property, please provide % of ownership.