

## RENTAL INFORMATION SHEET

Client name:

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Rental property address:

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Date property was purchased\*\*

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\*\*If the property was purchased in 2023, please provide all purchase documents

Was the rental property sold in 2023?	YES	NO	If YES, please provide all sale and original purchase documents
Was the property your personal residence prior to being rented?	YES	NO	If YES, please provide assessment of fair market value of the property at the time it was changed to a rental \$ _____
Do you have plans to reside in the rental property in the future?	YES	NO	
Is there any personal use of the property ?	YES	NO	If YES, the % personal use _____
Is the property a partnership?	YES	NO	If YES, your % _____
Do you want to depreciate the building?	YES	NO	
Is this property a short-term rental (ie: AirBnB, VRBO)	YES	NO	If YES, are you registered for GST? YES NO

**Rental Income**

**Total for the year**

\$ \_\_\_\_\_  
\$ \_\_\_\_\_

**Expenses**

**Total for the year**

Advertising \$ \_\_\_\_\_  
Property insurance \$ \_\_\_\_\_  
Interest (no principal portion of payments) \$ \_\_\_\_\_  
Office supplies and expenses \$ \_\_\_\_\_  
Legal and accounting fees \$ \_\_\_\_\_  
Administration & management fees \$ \_\_\_\_\_  
Maintenance & repairs (no asset purchases) \$ \_\_\_\_\_  
Salaries, wages & benefits \$ \_\_\_\_\_  
Property taxes \$ \_\_\_\_\_  
Travel expenses:  
    Accommodations/lodging \$ \_\_\_\_\_  
    Meals \$ \_\_\_\_\_  
Utilities: Heat \$ \_\_\_\_\_  
    Electricity \$ \_\_\_\_\_  
    Water and sewer \$ \_\_\_\_\_  
Condo/strata fees \$ \_\_\_\_\_  
Other fees (describe): \$ \_\_\_\_\_  
\$ \_\_\_\_\_

**Automobile Expenses:**

Year/make/model of vehicle used to earn rental income \_\_\_\_\_  
Year purchased: \_\_\_\_\_  
Purchase price: \$ \_\_\_\_\_  
Current value: \$ \_\_\_\_\_  
Kms driven during the year to earn rental income \_\_\_\_\_  
Total kms driven during the year \_\_\_\_\_

**Expenses**

**Total for the year**

Fuel \$ \_\_\_\_\_  
Maintenance and repairs \$ \_\_\_\_\_  
Insurance \$ \_\_\_\_\_  
Licensing/registration \$ \_\_\_\_\_  
Loan interest (no principal) \$ \_\_\_\_\_  
Lease payments \$ \_\_\_\_\_  
Parking \$ \_\_\_\_\_  
Autoclub (AMA, etc) \$ \_\_\_\_\_  
Other fees (describe): \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_

**Major purchases:**

items over \$500 (net of GST) and with a life expectancy exceeding 1 year

OR major repairs/renovations to the property

**Description of item purchased**

**Purchase price**

\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_