

AccXpert TaxServices

Rental Income Tax Return Checklist

Tax Return for Year: _____

Instructions: Please complete this attached checklist and return it to AccXpert TaxServices (email to: TaxServices@AccXpert.com fax: 1-613-800-0119), if available with a copy of your previous year tax return).

Client Name: _____ PROPERTY #1 PROPERTY #2 PROPERTY #3

Rental Property Address

Gross rents

Expenses

Advertising
Insurance
Repairs and maintenance
Interest
Property taxes
Utilities
Management & administration fees
Other expenses (Note 1)
Personal portion of expenses
Capital Expenditures (Note 3)
Purchase price of rental property
Legal fees and other costs
Furniture and equipment (cost)

PLEASE NOTE: All receipts should be kept by you in the event that Canada Revenue Agency requests them. Note 1: Other expenses are legal, accounting, other professional fees, salaries, travel, office and motor vehicle expenses. Please indicate what kind of expenses and the amounts. Note 2: If you are co-owner of the properties, please indicate your % of ownership and the other co-owner's name, address and social insurance number. Note 3: Please provide documents or receipts for the purchase.