



# Branham & Associates Inc.

Certified Public Accountant  
Accounting • Taxes • Consulting • QuickBooks Training and Consulting

## 2022 Rental Property Owners Basic List of Additional Information Needed

Taxpayer(s) Name \_\_\_\_\_

*The intent of this checklist is to assist you in gathering your necessary tax data needed to complete your tax return(s). The list is not intended to be exhaustive. If you have specific questions regarding rental income, expenses or deductions, please call our office to schedule an appointment.*

### Submit records of rental income and expenses, asset purchases, etc. by property. Check applicable form of submission.

- QuickBooks Accountant's Copy  
Can be uploaded via the portal, QB or emailed to Sue Brangham – [Sue@branghamcpa.com](mailto:Sue@branghamcpa.com). Provide QB Version, File Name, User Name, and Password
- Spreadsheet
- Other \_\_\_\_\_

**IMPORTANT: Regardless of your record keeping method - income and expenses must be sortable by property!**

### Provide all tax statements received for your rental properties and/or that you submitted to the IRS,

- 1099-Misc (Note: be sure to include all your income even if you did not receive a 1099)
  - 1099-K
  - 1099-Int
  - 1098
- None received
- Copy of 1099s issued by you, if not prepared by our office.

### Details of Fixed Asset Changes

- If property purchased, sold, or refinanced: Provide copy of settlement statement.
- Property improvements made (roof, drives, additions, flooring, etc.): Provide description of improvement, date it became useful and the cost. Must be listed by property.
- Assets purchases (i.e. new appliances): Provide asset description, date of purchase or in service date, and the cost. Must be listed by property.
- Asset Sale, Disposal or Salvage: Description of asset, date of disposal, salvage or sale and proceeds received, if applicable.
- No Changes were made to the fixed assets this year.

### Auto Expenses on a personal vehicle related to rental activity (provide information separately if more than 1 vehicle)

- Auto Expenses on a personal vehicle related to rental activity
  - Make and model of automobile used in rental activity:
  - Mileage information: Total 2022 mileage \_\_\_ & Total 2022 rental mileage \_\_\_\_\_
  - Interest paid on auto loan in 2022
- Standard Mileage Rate
- Elect to Use Actual Automobile Expenses, provide all of the following where applicable
  - Record of all auto expenses: gas, oil changes, maintenance, etc.
  - Copy of purchase and/or bill of sale statement if you purchased a new vehicle in 2022

**Other – please explain.**

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