



2007 Tax Organizer and Questionnaire for Rental Income and Expenses

This tax organizer can be filled-out and submitted to us with the necessary documents attached. Once we receive it, we will review it and call you with any questions and set a conference date if necessary in order to complete your return.

Rental Income and Expenses

For Each Rental Real Estate Property, List the Location and Type of Property:

1. _____
2. _____
3. _____

Were any of the properties purchased/converted to rental in 2007? If so we need the closing statements

Please fill out the income and expenses applicable for each property. If you have more than three properties, please ask for additional schedules.

| | Property 1 | Property 2 | Property 3 |
|-------------------------|------------|------------|------------|
| Income: | | | |
| Rents Received | _____ | _____ | _____ |
| Expenses: | | | |
| Advertising | _____ | _____ | _____ |
| Association Dues | _____ | _____ | _____ |
| Auto and Travel | _____ | _____ | _____ |
| Cleaning/Maintenance | _____ | _____ | _____ |
| Commissions | _____ | _____ | _____ |
| Gardening | _____ | _____ | _____ |
| Insurance | _____ | _____ | _____ |
| Labor | _____ | _____ | _____ |
| Professional Fees | _____ | _____ | _____ |
| Miscellaneous | _____ | _____ | _____ |
| Mortgage Interest | _____ | _____ | _____ |
| Other Interest | _____ | _____ | _____ |
| Repairs and Maintenance | _____ | _____ | _____ |
| Supplies | _____ | _____ | _____ |
| Taxes | _____ | _____ | _____ |

| | Property 1 | Property 2 | Property 3 |
|---------------|------------|------------|------------|
| Telephone | _____ | _____ | _____ |
| Utilities | _____ | _____ | _____ |
| Improvements | _____ | _____ | _____ |
| Other: | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Did you materially participate in these rental properties?

Did you use any property for personal purposes for more than 14 days?