



PROFILER
— CONSULTING —

4410 MacIver Ave NE
St. Michael, MN 55376
763.497.7308

Fill out one sheet for each rental - do not combine rentals. Providing complete information upfront allows us to prepare your tax return faster and with greater accuracy.

Current clients can use the “Check if similar to last year” box.

Rental Organizer (check box if royalties ☐)

Address		Tax Year	
City, State, Zip		Client Name	
Date Started		Property Type	

Income ☐ Check if similar to last year

Total Rent Received (do not include refundable deposits)	\$
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Expenses ☐ Check if similar to last year

Advertising & Promotion		Repair	
Business Miles Driven		Supplies	
Total Miles Driven		Taxes (property taxes)	
Cleaning and Maintenance		Utilities (paid by you)	
Commissions (paid to rental agencies, etc.)		Association dues	
Insurance (PMI, liability, and/or umbrella policies)		Rental license fees	
Legal and Accounting		Bank charges	
Management fees (paid for management by someone else)		Appliances, major improvements, furnishings, etc	
Interest - Mortgage (supply Form 1098)			
Interest - Other (credit cards/other loans just for rental)			

Property Cost & Allocation (new client or new property)

- Total Cost of Property (including improvements): _____
- Cost Allocated to Building: _____
- Cost Allocated to Land: _____

Please attach the Closing Disclosure (CD) for all new property purchases.

Capital Assets & Property Improvements

List any assets purchased or significant property upgrades completed this tax year:

Insurance Claims or Property Damage

If applicable, provide details:

- Date of event: _____
- Insurance proceeds received: _____
- Repairs completed / in progress: _____

Number of days the property was used personally: _____

Did you refinance this property during the tax year?

If yes, please attach the Closing Disclosure (CD).

Additional Notes