



**Loid Tax & Accounting, LLC**

www.loidcpa.com

Email: todd@loidcpa.com

Office: 941-358-8275

Mobile: 941-928-8285

Taxpayer: \_\_\_\_\_

Rental Property: \_\_\_\_\_

Address of Rental Property:

Street \_\_\_\_\_

City \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Did you materially participate in business? ☐Y ☐N

Did you make any payments in 2022 that would require you to file Form(s) 1099? ☐Y ☐N

If yes, Did you or will you file required Form(s) 1099? ☐Y ☐N

How many days did you personally use the property? \_\_\_\_\_

Were you actively managing the property? ☐Y ☐N

Rent \_\_\_\_\_

**Expenses:**

Advertising \_\_\_\_\_

Auto and Travel \_\_\_\_\_

Cleaning and  
Maintenance \_\_\_\_\_

Commissions \_\_\_\_\_

Insurance \_\_\_\_\_

Legal and  
Professional \_\_\_\_\_

Interest \_\_\_\_\_

Repairs \_\_\_\_\_

Taxes \_\_\_\_\_

Bank Fees \_\_\_\_\_

Dues and Subscriptions \_\_\_\_\_

Utilities \_\_\_\_\_

HOA \_\_\_\_\_

Other Expenses:

Description	Amount
-------------	--------

_____	_____
-------	-------

_____	_____
-------	-------

_____	_____
-------	-------

**Signature(s)**

I/We believe that the information disclosed in this organizer to be complete & accurate. I /We understand that incorrect or incomplete information may result in an erroneous return.

Sign form by typing your name in the block provided.

Taxpayer 1: \_\_\_\_\_ Date: \_\_\_\_\_

Taxpayer 2: \_\_\_\_\_ Date: \_\_\_\_\_