



REAL ESTATE INVESTMENT ORGANIZER

We are providing this organizer as supplemental information to the main individual organizer or to report real estate investment activity in an LLC, S-Corporation or C-Corporation. Utilize this to assist in organizing information related to your investment activities. This form will accommodate three properties. Attach additional if needed.

Last Name or Company Name _____

Section 1 General Information

	Yes	No
Is this activity performed inside an LLC, Partnership, S-Corporation or C-Corporation?		
Did you actively participate in the operation of the rental property during the year?		
Were more than half of personal services that you or your spouse performed during the year performed in real property trades?		
Did you or your spouse have more than 750 hours of services during the year in real property trades or businesses?		
Did you use bookkeeping software to keep track of this activity? If yes, provide a copy and skip the below section.		
Was any property occupied by you or your family during any portion of the year and the individual did not pay rent at fair market value? If yes, provide details including number of days occupied in the notes section.		

Section 2 Income and Expenses

Property Description:			
Property Type:	__ Residential __ Commercial	__ Residential __ Commercial	__ Residential __ Commercial
Rents Received (provide any 1099)			
Royalties Received			
Advertising			
Cleaning and maintenance			
Commission			
Insurance			
Legal and professional fees			
Management fees			
Mortgage Interest (if there is no 1098 more information is necessary)			
Other Interest			
Repairs			
Supplies			
Property Taxes			
Other Taxes (include description)			
Utilities			
Other (include description)			
Do you still own this property? If no provide sale or foreclosure information.	__ Yes __ No	__ Yes __ No	__ Yes __ No

Section 3
Major Improvements or New Assets

Please provide copies of HUD-1 or other closing documents for all new purchases.

Description	Date placed in service	Cost

Section 4
Vehicle Expenses

Vehicle Description (up to 2 vehicles):		
Date placed in service		
Cost/Fair market value as of the above date		
Lease Term, if applicable		
Total miles driven this year (not business miles under each property)		
Business miles driven from Jan – June 30		
Business miles driven from July 1 – Dec 31		
Did you use actual expenses instead of mileage deduction in previous years? If yes or you would like to use actual instead of mileage, fill out the below schedule.	___ Yes ___ No	___ Yes ___ No
Did you acquire, lease or dispose of a vehicle for business during this year? If yes, enclose purchase and sales contract or lease agreement	___ Yes ___ No	___ Yes ___ No
Do you have another vehicle available for personal purpose?	___ Yes ___ No	___ Yes ___ No
Do you have evidence to support your deduction	___ Yes ___ No	___ Yes ___ No
Is the evidence written?	___ Yes ___ No	___ Yes ___ No
Actual Expenses		
Gas, Oil, Repairs, Tires		
Insurance		
Parking		
Taxes (on registration statement)		
Tags & Licenses		
Interest		
Lease Payment		
Other (Include Descriptions)		

Notes: