



Real Estate Tax Return Checklist

- Copies of prior year Federal and State tax returns, if applicable.
- Copies of all Forms 1099-MISC, W-2, and all other relevant tax information.
- Financial Statements for each separate business and/or rental property.
 - Profit & Loss Statement
 - Balance Sheet
- Property Sale information. Regarding property sold for investment:
 - Purchase contract and escrow statements
 - List of all expenses and improvements related to the property
 - HUD-1 or similar Closing Statement
- List of assets or property purchased during the current year to include the date and dollar amount or purchase.
- Documents regarding any complex real estate transactions (i.e. 1031 exchanges, cost segregation analysis, etc...).
- Vehicle Information (used for business)
 - Mileage Log of all car travel during the year.
 - Year, make, and model of vehicle used for business
 - Vehicle expenses to include lease payments, amounts paid for gas, maintenance, etc...

Please note, this questionnaire is not a comprehensive list of all required information, and additional documentation may be required.