

Small Landlord Tax Document Checklist

A one-page receipt rescue list for organizing rental records before tax season.

Gather by property

- ☐ Rent and other rental-income records.
- ☐ Bank and credit-card statements used for rental activity.
- ☐ Property-tax and mortgage-interest statements.
- ☐ Insurance statements and owner-paid utility records.
- ☐ Repair, maintenance, cleaning, landscaping, and supply receipts.
- ☐ Professional fees, permits, licenses, and management expenses.
- ☐ Mileage or travel log for rental-related trips.
- ☐ Purchase, sale, refinance, and major-improvement documents.

Give every receipt five labels

- ☐ Property, date, vendor, category, and payment method.
- ☐ Separate ordinary repairs from larger improvements for accountant review.
- ☐ Scan fading paper receipts and keep the original when needed.
- ☐ Reconcile the folder against the bank statement monthly.

The 10-minute monthly habit

Create one folder per property and month. Add receipts while the reason is still obvious. At month-end, compare the folder with the bank statement and flag questions for your tax professional.

This checklist is for record organization and education. It is not tax, accounting, or legal advice. Ask a qualified tax professional which records and deductions apply to your situation.