

INVESTMENT REAL ESTATE QUESTIONNAIRE

For investment and rental real estate you own or plan to purchase.

Use additional copies of this form as needed to list all investment properties.

PASSIVE LOSSES

If you filed IRS Form 8582 (Passive Activity Loss Limitations) for the most recent tax year, please include a copy with the rest of your submitted tax documents.

CURRENT INVESTMENT PROPERTIES

		CURRENT PROPERTY 1	CURRENT PROPERTY 2	CURRENT PROPERTY 3
General	Property name			
	State			
	Ownership (e.g., individual, joint, LLC)			
	Taxation (e.g., sole proprietor, partnership, S-corp, C-corp)			
Valuation	Current value			
	Initial cost basis*			
	Depreciable basis**			
	Cumulative depreciation (Jan 1)			
Mortgage	Mortgage balance (Jan 1)			
	Interest rate			
	Monthly principle + interest payment			
Income and Expense	Gross annual rental income			
	Total annual expenses, including escrow (taxes/insurance), upkeep, marketing, property management fees			
Other	When do you plan to sell?			
	Other notes			

* Cost basis is generally your purchase price, including any fees or other acquisition costs. See IRS Publication 551 or speak with your accountant for details.

** Depreciable basis is generally the entire value of the property, less the value of the land. See IRS Publication 946 or speak with your accountant for details.

FUTURE INVESTMENT PROPERTIES

		FUTURE PROPERTY 1	FUTURE PROPERTY 2	FUTURE PROPERTY 3
General	Property name			
	State			
	Expected ownership (e.g., individual, joint, LLC)			
	Expected taxation (e.g., sole proprietor, partnership, S-corp, C-corp)			
Valuation	Expected purchase price			
	Expected purchase year			
	Expected depreciable basis*			
Mortgage	Expected mortgage needed			
	Expected interest rate			
	Expected mortgage term			
Income and Expense	Expected gross annual rental income			
	Expected total annual expenses, including escrow (taxes/insurance), upkeep, marketing, property management fees			
Other	When do you plan to sell?			
	Other notes			

* Depreciable basis is generally the entire value of the property, less the value of the land. See IRS Publication 946 or speak with your accountant for details.

Please return this completed form to finplanning@dmbs.com with the Financial Planning Questionnaire and all supporting documents.