



Assemble all documents

- Closing statements for any purchases, sales, and refinances of properties
- 1098 mortgage interest statements from all lenders
- Escrow statements detailing actual amounts paid for property taxes and insurance, or,
- Property tax statements and insurance statements from your insurer
- Schedule of capital improvements
- Statements from lawn and snow removal companies, or for any subcontracted work
- Home office square footage and related expenses
- Realized investment gains and losses



APEXVISION
TAX AND ACCOUNTING SOLUTIONS

Expenses to Track

Advertising/Marketing

Repairs and Maintenance

Commissions

Insurance

Professional Fees

Property Management Fees

Interest

Supplies

Taxes

Utilities

Depreciation

Home Office Expenses

Business Mileage

Travel Expenses

Education and Training

Snow Removal, Landscaping, Pest Control

Bank Fees

HOA Fees, if applicable

Employees and Independent Contractors

Business Meals (50% Deductible)