



# SWEENEY BRIDE

STRATEGIC WEALTH ADVISORY

## 2025 RENTAL PROPERTY ORGANIZER

IF THIS IS YOUR FIRST YEAR WITH OUR FIRM, PLEASE ENSURE TO PROVIDE US A LIST OF CURRENT CAPITAL ASSETS/ IMPROVEMENTS TO THE PROPERTY(IES) AND YOUR FULL PREVIOUS TAX RETURN SO WE CAN ENSURE ASSETS ARE DOCUMENTED CORRECTLY. **PLEASE DO NOT USE A SELF EMPLOYMENT ORGANIZER FOR RENTAL INCOME EVEN IF IT IS FOR VACATION OR SHORT TERM RENTALS, UNLESS YOU OPERATE IT AS A SERVICE DRIVEN HOSPITALITY BUSINESS (I.E. INN OR B&B).**

PROPERTY	A	B
PHYSICAL ADDRESS INCL. POSTAL CODE		
OWNERSHIP SOLE/SPOUSE CO-OWNER/%		
DESCRIPTION WHOLE UNIT/ SUITE /SEPARATE UNIT ON PROPERTY (W/S/P)		
USAGE PRIMARY RESIDENCE/VACATION/INCOME ONLY (R/V/I)		
HOW MANY WEEKS/MONTHS DID YOU RENT?		
HOW MANY WEEK/MONTHS WERE FOR PERSONAL USE?		
SQ FT OF WHOLE UNIT*		
SQ FT OF RENTED SPACE*		
RENTAL INCOME RECEIVED		

\* IF RENTED SPACE IS A SEPARATE UNIT ON THE MAIN PROPERTY USE % INSTEAD OF SQ FT

PROPERTY EXPENSES		
USE TOTAL YEARLY AMOUNTS FOR ALL EXPENSES INCL GST. WE WILL PRORATE PROPERTY EXPENSES TO RENTAL USE.		
	A	B
HOME INSURANCE		
MORTGAGE INTEREST		
MAINTENANCE/REPAIRS*		
PROPERTY TAXES		
HEAT GAS, PROPANE		
HYDRO ELECTRICITY		
UTILITIES WATER, GARBAGE		
STRATA FEES		
INTERNET		
OTHER** _____		
IF YOU HAVE A HOME OFFICE ASSOCIATED WITH RENTAL MANAGEMENT ALSO SEE THE HOME OFFICE EXPENSE SECTION BELOW.		

\* DO NOT INCLUDE STRUCTURAL CHANGES OR RENOVATIONS

\*\* i.e. SECURITY / LANDSCAPING

RENTAL EXPENSES		
USE THIS SECTION FOR EXPENSES DIRECTLY RELATED TO YOUR RENTAL INCOME; THEY WILL BE DEDUCTED IN FULL.		
	A	B
ADVERTISING / PROMOTION		
RENTERS INSURANCE		
BANK CHARGES		
OFFICE EXPENSES* % OF CELL FEES		
RENTAL SUPPLIES**		
LEGAL/ ACCOUNTING FEES		
MANAGEMENT / ADMIN. FEES		
WAGES		
LICENCES / PERMITS		
OTHER*** _____		
IF YOU HAVE PERSONAL VEHICLE USAGE ASSOCIATED WITH RENTAL MANAGEMENT USE THE VEHICLE EXPENSE SECTION BELOW.		

\* SEE THE SECTION - HOME OFFICE EXPENSE BELOW FOR UNIQUE SITUATIONS

\*\* CONSUMABLES LIKE PAPER TOWEL, USE PURCHASES SECTION FOR ASSETS

\*\*\* i.e. REPLACING OR REPAIRING DAMAGED ASSETS



# SWEENEY BRIDE

STRATEGIC WEALTH ADVISORY

VEHICLE EXPENSES	
ONLY IF USED REGULARLY FOR PROPERTY MANAGEMENT OR GUEST TURNOVER	
YEAR/ MAKE/ MODEL OF VEHICLE	
TOTAL KM DRIVEN IN THE YEAR	
RENTAL KM DRIVEN IN THE YEAR	
FUEL GAS, PROPANE, OIL, ELECTRICITY	
VEHICLE LOAN INTEREST ONLY	
INSURANCE	
LICENCE/ REGISTRATION FEES	
REPAIRS & MAINTENANCE	
VEHICLE LEASE PAYMENTS	
LEASE DETAILS (DATE STARTED/ENDING)	
PARKING/TOLLS	
STORAGE COSTS	

HOME OFFICE EXPENSES	
IF YOU MANAGE MULTIPLE SHORT TERM RENTALS YOU CAN CLAIM SOME HOME OFFICE USAGE - PLEASE REASONABLY INDICATE TIME SPENT INCLUDE TOTAL EXPENSE WE WILL PRORATE TO USAGE	
SAME HOME AS RENTAL Y (A/B) OR N	
TOTAL AREA OF HOME	
TOTAL AREA USED FOR BUSINESS*	
% TIME SPENT ON MANAGEMENT	
HEAT GAS, PROPANE	
HYDRO ELECTRICITY	
INSURANCE	
MAINTENANCE / REPAIRS	
MORTGAGE INTEREST	
PROPERTY TAXES	
UTILITIES WATER, GARBAGE	
STRATA FEES	
INTERNET	
OTHER _____ i.e. SECURITY	

VEHICLE PURCHASE DETAILS*	
*FILL IN DETAILS OR PROVIDE THE PURCHASE AGREEMENT	
DO YOU WANT TO ADD A VEHICLE TO CCA Y/N	
PURCHASE DATE	
NEW OR USED N/U	
PURCHASE COST BEFORE GST/PST	
GST/PST	
HYBRID ELECTRIC VEHICLE Y/N	
DID YOU SELL PAST WORK VEHICLE Y/\$/N	
LIKELY TO SELL IN THE NEXT 2-5 YEARS Y/N	

\*COMPLETE THIS IF YOU WANT TO CLAIM YOUR VEHICLE FOR CAPITAL COST ALLOWANCE (IT DOES NOT NEED TO BE NEW IN THIS YEAR).

PURCHASES*	ITEM NEW / USED (N/U)	AMOUNT / DATE
SOFTWARE NOT FOR EQUIPMENT SYSTEM		
COMMUNICATIONS PHOTOCOPY/FAX/PHONE EQUIP.		
ELECTRONICS COMPUTER HARDWARE		
TOOLS <\$500/ITEM INCL. UTENSILS CHINA LINENS		
TOOLS >\$500/ITEM INCL. UTENSILS CHINA LINENS		
FURNITURE/ FIXTURES / APPLIANCES/ EQUIPMENT		
OTHER _____		
OTHER _____		

IF YOU ARE A NEW SB TAX CLIENT, WE NEED THE T2125 WORKSHEETS FROM YOUR LAST T1 RETURN TO CAPTURE CCA ADDITIONS AND UCC AMOUNTS

\* DO NOT INCLUDE STRUCTURAL CHANGES OR RENOVATIONS

TRAVEL EXPENSES ONLY IF REQUIRED FOR PROPERTY MANAGEMENT	
FARES FERRIES ETC.	
ACCOMMODATION	
MEALS FULL AMOUNT (WE WILL PRORATE TO 50% AS PER CRA INCLUSION)	