

REAL ESTATE CHECKLIST

RENTAL PROPERTY

(If property was purchased during the year, please provide the Agreement of Purchase and the Lawyer's reporting letter)

Address of the property

Name of co-owner (if jointly owned)

Share % of co-owner

SIN # of co-owner

Period rented (if part of the year) From To

Gross Rental Income

Expenses:

Insurance

Mortgage Interest

Repairs and maintenance

Property taxes

Utilities (owner paid portion)

Management & administration

Professional fee

Advertising

Other

Has CCA / Amortization ever been claimed on this property? Yes No

If Yes - how much total claimed to date

NO Major Renovations / Purchase of appliances claimed here.

SALE OF REAL ESTATE (other than principal residence)

(Please provide the Agreement of Purchase and Sale and the Lawyer's reporting letter for BOTH the purchase and sale transactions)

Address of property sold

Name of co-owner

Share % of co-owner

SIN # of co-owner

Date purchased

Type of property: Residential
Commercial
Agricultural

Purchase price

Legal and other costs of purchase

New build-adjustment cost from SOA

Additions and/or major improvements

Other

Sales price

Legal and other costs on sale

Commission paid to Realtor

Mortgage break penalty

Accounting fee

Other

Property sold was principal residence Yes No

INSTRUCTIONS:

Ensure all required fields are completed accurately. Boxes appearing with Red border are mandatory where applicable.
Please download this check list on your device, then fill it, save it and send it by email with supporting documents.