RENTAL PROPERTY RETURNS / 01

MAP THE RENTAL-PROPERTY CONTEXT

Give the preparer a non-sensitive starting point. Use neutral labels and leave classification and tax treatment to the professional.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Tax year or years to discuss and whether a prior preparer was involved

Property count and neutral labels only - no addresses, parcel numbers or values

Broad ownership or responsible-party context for the preparer to assess privately

Rental, personal-use, vacancy or other use-change questions - no self-classification

Purchase, sale, refinance, improvement or management changes to discuss - no amounts

Prior returns, workpapers or property schedules available through a secure channel

Preparation only. Not tax, accounting or legal advice; no form, reporting treatment, income, expense, depreciation, basis, use, ownership, residency, deduction, filing status, deadline, liability, eligibility or outcome determination. Keep sensitive data out.

RENTAL PROPERTY RETURNS / 02

ORGANIZE RECORD CATEGORIES - NOT AMOUNTS

Record whether a category exists, may be incomplete or needs discussion. Do not copy figures or private records into this workbook.

Income-record categories available and any missing periods - no figures

Expense-record categories available and any mixed or unclear items - no figures

Purchase, closing, financing or refinance record categories available

Improvement, repair or project record categories for the preparer to review

Sale, transfer, casualty or other disposition record categories, if any

Property-manager statements, prior workpapers and other summary records available

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RENTAL PROPERTY RETURNS / 03

PREPARE FOR SECURE HANDOFF AND SCOPE

Tick what is ready, then ask the preparer to define the secure exchange, review process and written engagement.

- [ ] Only neutral property labels appear in this workbook
- [ ] No addresses, IDs, account details, values or tax figures are entered
- [ ] Tax years and prior-return availability are summarized
- [ ] Ownership and use changes are framed as questions
- [ ] Record categories are marked available, incomplete or unknown
- [ ] Each preparer will receive the same non-sensitive overview
- [ ] Secure record exchange and authorized access will be explained
- [ ] No form, deduction, treatment, deadline or outcome is assumed

Secure upload, access, retention and record-return process to confirm

Preparation, review, filing and follow-up responsibilities to confirm

Open questions, missing items, communication contacts and completion handoff

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RENTAL PROPERTY RETURNS / 04

QUESTIONS FOR A RENTAL-PROPERTY TAX PREPARER

Record how each preparer would assess context, receive records securely, resolve open items and define the engagement.

Experience: who prepares and reviews rental-property work, and what experience is relevant?

Context: what properties, tax years, ownership and use-change facts must be reviewed privately?

Records: what categories are needed, how are they shared securely and how are gaps handled?

Open items: how will questions and professional judgments be explained and documented?

Scope: what preparation, review, filing and follow-up work is included or excluded?

Handoff: what will I receive, how are records returned or retained, and who handles later questions?

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RENTAL PROPERTY RETURNS / 05

COMPARE THE SAME RENTAL-PROPERTY BRIEF

Use A and B in every box. Compare only after both preparers receive the same non-sensitive property, tax-year and record-readiness context.

Preparer A / Preparer B / discussion dates and the same property-and-tax-year overview

Relevant experience, assigned team, review process and questions to resolve - A / B

Secure handoff, record needs, communication and completion deliverables - A / B

Written scope, exclusions, timing, terms, open questions and overall fit - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Tax Preparation request. Share a non-sensitive property count, tax years, broad changes, record-category readiness and secure-handoff needs so participating pros can compete with proposals. Compare relevant experience, engagement scope, review, communication, timing, written terms and fit; a private facts-and-records review may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A secure property-context, tax-year and record-category review may be needed before a final engagement proposal.

Planning guide: https://www.pickyourpro.ai/services/tax-preparation/rental-property-returns

IRS: About Schedule E (Form 1040) (official reference)

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