



Real Estate Investor | New Client Intake

Winter/Spring 2020

To our newest client –

Thank you for choosing our firm to prepare your 2020 income tax returns. We understand lots of options exist in the marketplace and are humbled and grateful you have chosen us as your partner. In addition to the following items, **please bring a copy of the last income tax returns you have filed (federal and state), if applicable.**

Formation & background information.

- Copy of LLC Operating agreement, Realty Trust, or Corporate by-laws (as applicable).
- Copy of any bank loan covenants (if applicable).
- Number of hours you personally spend working in real estate related activities for 2019.
- Number of days rented or available to rent in 2019.
- Number of days you occupied the property in 2019, if any.

Depreciation.

- Copy of prior year depreciation schedules to the extent they are available.
- Information on any new capital (depreciable) assets purchased or disposed of in 2019

Income and expense data.

- See worksheet on the following page.

About LCW CPAs.

Founded in 1987, LCW CPAs is a full-service Certified Public Accounting Firm. Headquartered in Lawrence, Massachusetts, and serving the Merrimack Valley, Southern New Hampshire and Greater Boston, we employ a full-time staff of 18 individuals who provide managed accounting services, taxation services, consulting and assurance services to our diverse clientele of closely held business owners, real estate developers, professional services firms, and private clients. Our nimble size enables us to tailor our service offerings based upon our client needs and offer them at a value-added price.

As always, please let us know if you have any questions. We look forward to working with you!

Warmest regards,

LCW | Certified Public Accountants

Physical Address (Street, City, State, Zip): _____

Property Type: _____

Totals

Income _____

Expenses

Advertising _____

Auto and Travel _____

Cleaning and Maintenance _____

Commissions _____

Insurance _____

Legal and Other Professional Fees _____

Management Fees _____

Mortgage Interest _____

Other Interest _____

Repairs _____

Supplies _____

Taxes _____

Utilities _____

Other: _____

Other: _____

Other: _____

Other: _____

Other: _____

Other: _____

Total Expenses _____