



New
 Returning

Rental Property - Client Profile & Financial Summary

Client Name(s): _____
E-mail: _____ Cellphone #: _____

Property address: _____

Ownership %: _____ % of Home if appl: _____
Business or residential: _____ Number of units: _____
HST registrant/frequency: _____ HST number: _____
Date of purchase: _____ Purchase price: _____
Date of sale: _____ Sale price: _____

Mortgage / Lease Cos.: _____

RENT INCOME \$ _____

Insurance: \$ _____

Mortgage interest: _____

Professional fees: _____

Maintenance: _____

Property tax: _____

Utilities: Heat _____ paid by tenants? YES / NO _____
Hydro _____

Cable/internet/phone: _____ paid by tenants? YES / NO _____

Other: _____

TOTAL \$ _____

Take CCA? YES / NO _____

Other notes:

DATE RECEIVED _____

BY _____