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TAX CHECKLIST FOR PERSONAL TAX RETURNS

Please read this document carefully. It will save you taxes and time.

Happy 2018! With major tax changes coming into action for 2018, we are doing our best to keep you up to date and make tax preparation easy for you. In order for us to prepare your return more efficiently, please review the following pages, as outlined below.

Page 2: Engagement Letter outlining tax preparation services-**please sign and return to us.**

Page 4: Tax Checklist – To help gather/organize your tax information for submission to us.

Page 8: Key tax savings and compliance questions for this year.

Page 9: Exhibit A – If you have stock sales or trading activity, use this as a guideline.

Page 10: Exhibit B – If you are self-employed or own rental real estate, use this as a guideline.

Once you have all of your tax information together after reviewing these pages, please forward them to our office. Once we receive them, we will alert you right away and keep you posted throughout the tax preparation process.

Here are the ways you can send us your tax return information:

- **Electronically:** You can send us information through our online forms or upload to your Smart Vault client portal. The client portal is located at <https://pjfcpa.smartvault.com>. Please contact us to register for the portal if you haven't done so already.
- **By Mail:** Please mail to our Kissimmee office (231 N. John Young Pkwy, Kissimmee, FL 34741).
- **In Person:** Information can be dropped off at our Kissimmee or Orlando offices.
- **By Fax:** Our fax number is 407-847-5921.

With the experience of the quality tax team in our firm, this year should be smoother than ever. Just so you know, the following people work with me in my office. In addition to me, they may contact you to ask for information or provide instructions. You may also contact any of them for questions on your account as well. We will all know what's happening with you.

- Abe Gandhi, C.P.A., Manager, abeg@pjfcpa.com, 407-847-6600 x102
- Cesarina Martinez, Accountant, cesarina@pjfcpa.com, 407-847-6600 x105
- Peter Hartman, Accountant, phartman@pjfcpa.com, 407-847-6600 x106
- Sonia Rodriguez, Office Administrator, sonia@pjfcpa.com, 407-847-6600 x103

Thank you for your business! If you have any friends or associates who are interested in accounting or tax services, we are always grateful for an introduction.



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January 16, 2018

This letter is to confirm and specify the terms of our engagement with PETER J. FREULER JR., PA, C.P.A. for the year ended December 31, 2017, and to clarify the nature and extent of the tax services we will provide.

We will prepare the federal and state, if any, individual income tax return for calendar year 2017. We are not responsible for returns not listed above. We are under no duty to review the information you provide to determine whether you may have a filing obligation with any state. If we become aware of any other filing requirement, we will tell you the obligation and may prepare the appropriate returns at your request as a separate engagement.

This engagement letter does not cover the preparation of any financial statements, which, if we are to provide, will be covered under a separate engagement letter.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents canceled checks, and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax return(s) and, you should review them carefully before you sign them.

You agree that in the event your return(s) cannot be completed by the due date, it may become necessary for us to apply to extend the due date. Extensions are required when we do not receive information from you needed to prepare a return on a timely basis. **The information needed to complete the tax returns must be received no later than March 23, 2018 so that the returns may be completed by the original due dates.** Applying for an extension of time may extend the time available for a taxing authority to undertake an audit of your return or may extend the statute of limitations. Additionally, extensions may affect your liability for penalties and interest or compliance with government deadlines. Late payment and underpayment penalties and interest charges accrue on any income taxes that remain unpaid as of the original due date of your income tax returns. We are available to discuss this matter with you at your request at our regular hourly fee should the need arise.

We may provide you with an organizer requesting specific information. Completing the organizer will assist us in making sure you are well served for a reasonable fee. You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that you have disclosed to us all relevant facts affecting the returns. This will include the ownership of or signature authority over any foreign bank accounts and the ownership of any other foreign financial assets. We will not verify the information you give us; however, we may ask for additional clarification of some information.

You should also know that IRS audit procedures will almost always include questions on bartering transactions and on deductions that require strict documentation such as travel and entertainment expenses and expenses for business usage of autos and computers. In preparing your returns, we rely on your representations that we have been informed of all bartering transactions and that you understand and have complied with the documentation requirements for your expenses and deductions. If you have any questions about these issues, please contact us.

In accordance with federal law, in no case will we disclose your tax return information to any location outside the United States, to another tax preparer outside of our firm for purposes of a second opinion, or to any other third-party for any purpose other than to prepare your return without receiving your consent.

The Internal Revenue Code and regulations impose preparation and disclosure standards with non-compliance penalties on both the preparer of a tax return and on the taxpayer. To avoid exposure to this penalties, it may be necessary in some cases to make certain disclosures to you and/or in the tax return concerning positions taken on the return that do not meet these standards. Accordingly, we will discuss tax positions that may increase the risk of exposure to penalties and any recommended disclosures with you before completing the preparation of the return. If we concluded that we are obligated to disclose a position and you refuse to permit the disclosure, we reserve the right to withdraw from the engagement and you agree to compensate us for our services to the date of withdrawal. Our engagement with you terminates upon our withdrawal.

Federal, state and local taxing authorities impose various penalties and interest charges for non-compliance with tax law, including for example, failure to file or late filing of tax returns and underpayment of taxes. You as the taxpayer remain responsible for the payment of all taxes, penalties, and interest charges imposed by taxing authorities.

The IRS permits you to authorize us to discuss, on a limited basis, aspects of your return for one year after the return's due date. You consent to such a discussion is evidenced by checking a box on the return. Unless you tell us otherwise, we will check that box authorizing the IRS to discuss your return with us.

It is our policy to keep records related to this engagement for seven years. However, we do not keep any of your original records, so we will return those to you upon completion of the engagement. When records are returned to you, it is your responsibility to retain and protect the records for possible future use, including potential examination by governmental or regulatory agencies.

The return(s) may be selected for review by the taxing authorities. In the event of an audit, you may be requested to produce documents, records and other evidence to substantiate the items of income and deduction shown on tax return. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of a tax examination, we will be available, upon request, to represent you. However, such additional services are not included in the fees for the preparation of the tax return(s).

Our fees for tax services will be based in part upon the amount of time required at our standard billings rates for the personnel working on the engagement, plus out-of-pocket expenses. All invoices are due and payable upon presentation. It is the policy of PETER J. FREULER, JR., P.A., C.P.A. to suspend work for non-payments of fees.

If the foregoing correctly sets forth your understanding of our tax engagement, please sign this letter in the space provided and return it to our office. If you disagree with any of these terms, please notify us immediately.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,

Peter J. Freuler, Jr., P.A., C.P.A.

Signature

Printed Name

Date

Signature

Printed Name

Date

TAX CHECKLIST

USE THIS PAGE TO HELP GATHER YOUR TAX RECORDS TO SEND TO US

INCOME ITEMS

FORM

- | | | |
|------|-----------|---|
| 1.) | W-2 | Salaries paid to you by your employer. |
| 2.) | 1099-B | Sales of stocks & bonds. (*) |
| 3.) | 1099-DIV | Dividends Earned. |
| 4.) | 1099-G | Unemployment Compensation and/or State or local refund. |
| 5.) | 1099-INT | Interest income earned. |
| 6.) | 1099-MISC | Self employed earnings or rental income. (**) |
| 7.) | 1099-R | Distributions from IRAs, pensions, annuities. |
| 8.) | K-1 | Earnings from S-Corps, Partnerships, Estates & Trusts. |
| 9.) | 1099-SSA | Earnings from Social Security benefits |
| 10.) | | Any other evidence of income, including any Form 1099-C or 1099-A |

(*) - For each sale listed on the 1099-B, please provide the related purchase information including amount and date acquired. An Excel spreadsheet is ideal, see **Exhibit A** which follows.

(**) – If you have earnings from self employment or rental income, please provide a list of expenses summarized by category for the year. An Excel spreadsheet is good, see **Exhibit B**.

EXPENSE/DEDUCTION ITEMS

- | | | |
|-----|------|---|
| 1.) | 1098 | Mortgage Interest paid, Points paid |
| 2.) | | Real Estate taxes paid, and date the taxes were paid. |
| 3.) | | Contributions/Donations made to charity, cash and/or clothing, etc.
-If more than \$250 to a particular charity, you must retain a statement from the charity. |
| 4.) | | Un-reimbursed medical expenses. |

OTHER ITEMS

- | | | |
|-----|--|---|
| 1.) | | Any new dependents this year? If so please provide full name, date of birth and social security number. |
| 2.) | | If you want your refund electronically deposited to your bank account, provide your bank routing and account number. You can find these numbers at the bottom of your personal check, or you can just send us a voided check. |

Please feel free to call or email with any questions.

Questionnaire

Please check the appropriate box and include all necessary details and documentation.

Yes **No**

Personal Information

- | | | |
|---|--------------------------|--------------------------|
| Did your marital status change during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did your address change from last year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Can you be claimed as a dependent by another taxpayer? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you change any bank accounts that have been used to direct deposit funds from (or to) the IRS or other taxing authority during the tax year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, please send us the IRS letter | <input type="checkbox"/> | <input type="checkbox"/> |

Dependent Information

- | | | |
|--|--------------------------|--------------------------|
| Were there any changes in dependents from the prior year? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, explain: _____ | | |
| Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,000? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have dependents who must file a tax return? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you provide over half the support for any other person(s) other than your dependent children during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay for child care while you worked or looked for work? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any expenses related to the adoption of a child during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? | <input type="checkbox"/> | <input type="checkbox"/> |

Purchases, Sales and Debt Information

- | | | |
|---|--------------------------|--------------------------|
| Did you start a new business or purchase rental property during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you acquire a new or additional interest in a partnership or S corporation? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you sell, exchange, or purchase any real estate during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you purchase or sell a principal residence during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you foreclose or abandon a principal residence or real property during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you acquire or dispose of any stock during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you take out a home equity loan this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you refinance a principal residence or second home this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you sell an existing business, rental, or other property this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you lend money with the understanding of repayment and it became uncollectable? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any debts canceled or forgiven this year, such as home mortgage or student loans? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year? | <input type="checkbox"/> | <input type="checkbox"/> |

Income Information**Yes****No**

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as investment accounts or partnerships?

☐☐

Did you receive any income from property sold prior to this year?

☐☐

Did you receive any unemployment benefits during the year?

☐☐

Did you receive any disability income during the year?

☐☐

Did you receive tip income not reported to your employer this year?

☐☐

Did any of your life insurance policies mature, or did you surrender any policies?

☐☐

Did you receive any awards, prizes, hobby income, gambling or lottery winnings?

☐☐

Do you expect a large fluctuation in income, deductions, or withholding next year?

☐☐**Retirement Information**

Are you an active participant in a pension or retirement plan?

☐☐

Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?

☐☐

Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

☐☐

Did you make any withdrawals from an education savings or 529 Plan account?

☐☐

Did you receive any Social Security benefits during the year?

☐☐

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

☐☐**Education Information**

Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?

☐☐

Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent?

☐☐

Did anyone in your family receive a scholarship of any kind during the year?

☐☐

Did you make any contributions/withdrawals to/from an education savings or 529 Plan acct?

☐☐

Did you pay any student loan interest this year?

☐☐

Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

☐☐**Health Care Information**

Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored covered (i.e., Medicare/Medicaid) for every month of 2014 for your family and dependents?

☐☐

Did anyone in your family qualify for an exemption from the health care coverage mandate?

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, please provide any **Forms 1095-A** you received.

☐☐

Did you make any contributions to a Health savings account (HSA) or Archer MSA?

☐☐

Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?

☐☐

	<u>Yes</u>	<u>No</u>
Did you pay health care or long-term care premiums for yourself or your family?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any COBRA health care coverage continuation premiums?	<input type="checkbox"/>	<input type="checkbox"/>
If you are a business owner, did you pay health insurance premiums for your employees this year?	<input type="checkbox"/>	<input type="checkbox"/>
ized Deduction Information		
Did you incur a casualty or theft loss or any condemnation awards during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please provide evidence such as a receipt from donee organization, a canceled check, or record of payment, to substantiate all contributions made.		
Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C		
or other written acknowledgement from donee organization.	<input type="checkbox"/>	<input type="checkbox"/>
Did you have an expense account or allowance during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you use your car on the job, for other than commuting?	<input type="checkbox"/>	<input type="checkbox"/>
Did you work out of town for part of the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any expenses related to seeking a new job during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any major purchases during the year (cars, boats, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any out-of-state purchases (by telephone, internet, mail, in person)	<input type="checkbox"/>	<input type="checkbox"/>
that the seller did not collect state sales or use tax?	<input type="checkbox"/>	<input type="checkbox"/>
ellaneous Information		
Did you make gifts of more than \$14,000 to any individual?	<input type="checkbox"/>	<input type="checkbox"/>
Did you utilize an area of your home for business purposes?	<input type="checkbox"/>	<input type="checkbox"/>
Did you engage in any bartering transactions?	<input type="checkbox"/>	<input type="checkbox"/>
Did you retire or change jobs this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you incur moving costs because of a job change?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any individual as a household employee during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make energy efficient improvements to your main home this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive an Identity Protection PIN from the Internal Revenue Service or have you been a victim of identity theft? If yes, attach the IRS letter.	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to designate \$3 to the Presidential Election Campaign Fund/? If you check yes, it will not change your tax or reduce your refund.	<input type="checkbox"/>	<input type="checkbox"/>

11 KEY TAX SAVING QUESTIONS

If you answer YES to the following questions, please provide the information requested.
Please do not provide us with receipts, only a simple schedule for any information requested.

- 1) Did you purchase, sell or refinance real estate during 2017? If so, deductible refinance expenses may come into play.
 - If YES, please provide us with the HUD settlement statement from the purchase, sale or refinance.
- 2) Did you purchase an energy-efficient product or renewable energy system for your home, such as heating, air conditioning, roofing, windows, doors, insulation, hot water heater, boiler, stove or solar panel? If so, an energy tax credit may be available.
 - If YES, please provide us with the date of purchase, what you purchased and the cost.
- 3) Did you pay college or higher education tuition or related expenses?
 - If YES, please provide us with this information along with any year-end tax forms the school sent.
- 4) Did you purchase (not lease) a new or used vehicle? If so, a sales tax deduction and/or an energy credit may be available.
 - If YES, please provide us with the date of purchase, cost, exact make and model and amount of sales tax paid on the purchase.
- 5) Do you want to contribute to an IRA, if eligible?
 - If YES, simply let us know and we will make the computation. If you have already contributed to the IRA, let us know the amount.
- 6) Do you need assistance with forming a corporation or LLC for your business? Significant tax savings are usually available by operating this way, rather than as a sole proprietor.
 - If YES, please let us know and we will provide you with further information so you can make an informed decision.
- 7) Do you have any Long Term Care premiums or medical expenses that were unreimbursed by insurance?
 - If YES, please let us know the amounts.
- 8) Do you have any bank or investment accounts located outside of the United States or signing authority on an account located outside of the United States?
 - If YES, please let us know the name and address of the bank/brokerage company, highest dollar amount in the account in 2017 and the name and SSN of any co-signor or joint party on the account.
- 9) Did you have any child care expenses such as day camp, day care and/or after school activities?
 - If YES, please provide us the amount paid per child, the name of the provider(s), their address and their federal tax ID #.
- 10) Did you use your personal vehicle for work purposes or have any other unreimbursed work expenses?
 - If YES, please provide us with amounts spent for each expense (office supplies, meals, etc.). For auto use, please provide us with the make/model of each car used for work, along with (1) total miles driven and (2) business miles driven from January to December 2017.
- 11) Did you have any gambling or lottery winnings in 2017?
 - If YES, please provide us with a list of gambling losses and lottery purchases made in 2017. Gambling losses are deductible up to the amount of gambling and lottery winnings.

Exhibit A

Excel spreadsheet example for stock sales.

If you sold securities this year please be sure to provide the 1099-B from the brokerage firm(s) that held these securities for you. The 1099-B reports the SALES amounts only.

Naturally, we need the PURCHASE/COST amounts so the corresponding gain/loss can be calculated.

Often your brokerage firm will provide the PURCHASE/COST info as an attachment to your 1099-B. If so, be sure to send that to us-there is nothing more you need to do, we'll take care of the rest.

If your brokerage firm does not provide the PURCHASE/COST info, please call your broker and ask him/her to provide.

If your broker does not have the PURCHASE/COST info, you will need to provide yourself to us. Please deliver this to us in the Excel format shown below

You need to provide/figure out

From 1099-B exactly

↓

↓

↓

↓

EXAMPLE

Name of Stock	Date Purchased	Date Sold	Sale Amount	Purchase Amount	Gain/(loss)
IBM	12/15/02	10/3/xx	5,000	4,000	1,000
CONACO	5/6/05	11/12/xx	7,500	8,200	(700)
PEPSI	1/7/06	6/19/xx	2,000	1,500	500
Totals			14,500	13,700	800

Exhibit B

Excel spreadsheet for Self Employed and Rental Income.

Complete for *Self Employed*:

Type of Business?	<input style="width: 95%;" type="text"/>
What % of your home do you use for business?	<input style="width: 95%;" type="text"/>
Self Employed Income	
Income per 1099-MISC	\$ <input style="width: 80%;" type="text"/>
Income not 1099-MISC	\$ <input style="width: 80%;" type="text"/>
Total Income	\$ <input style="width: 80%;" type="text"/>
Expenses	
Travel	\$ <input style="width: 80%;" type="text"/>
Computers & Equipment	\$ <input style="width: 80%;" type="text"/>
Office	\$ <input style="width: 80%;" type="text"/>
Advertising	\$ <input style="width: 80%;" type="text"/>
Dues & Subscriptions	\$ <input style="width: 80%;" type="text"/>
Legal & Professional	\$ <input style="width: 80%;" type="text"/>
Health Insurance	\$ <input style="width: 80%;" type="text"/>
Insurance-Other	\$ <input style="width: 80%;" type="text"/>
Bank Charges	\$ <input style="width: 80%;" type="text"/>
Outside Labor	\$ <input style="width: 80%;" type="text"/>
Postage	\$ <input style="width: 80%;" type="text"/>
Repairs	\$ <input style="width: 80%;" type="text"/>
Miscellaneous	\$ <input style="width: 80%;" type="text"/>
Other - explain	\$ <input style="width: 80%;" type="text"/>
Other - explain	\$ <input style="width: 80%;" type="text"/>
Other - explain	\$ <input style="width: 80%;" type="text"/>
Other - explain	\$ <input style="width: 80%;" type="text"/>
Total Expenses	\$ <input style="width: 80%;" type="text"/>
Profit/(Loss)	\$ <input style="width: 80%;" type="text"/>

Complete for *Rental Income*:

Date Property Acquired?	<input style="width: 95%;" type="text"/>
Purchase amount?	<input style="width: 95%;" type="text"/>
Improvements since purch'd?	<input style="width: 95%;" type="text"/>
% of property you live in?	<input style="width: 95%;" type="text"/>
Rental Income	
Income per 1099-MISC	\$ <input style="width: 80%;" type="text"/>
Income not 1099-MISC	\$ <input style="width: 80%;" type="text"/>
Total Income	\$ <input style="width: 80%;" type="text"/>
Expenses	
Travel	\$ <input style="width: 80%;" type="text"/>
Computers & Equipment	\$ <input style="width: 80%;" type="text"/>
Office	\$ <input style="width: 80%;" type="text"/>
Advertising	\$ <input style="width: 80%;" type="text"/>
Dues & Subscriptions	\$ <input style="width: 80%;" type="text"/>
Legal & Professional	\$ <input style="width: 80%;" type="text"/>
Commissions	\$ <input style="width: 80%;" type="text"/>
Insurance	\$ <input style="width: 80%;" type="text"/>
Bank Charges	\$ <input style="width: 80%;" type="text"/>
Maintenance	\$ <input style="width: 80%;" type="text"/>
Major Improvements	\$ <input style="width: 80%;" type="text"/>
Real Estate Taxes	\$ <input style="width: 80%;" type="text"/>
Mortgage Interest	\$ <input style="width: 80%;" type="text"/>
Miscellaneous	\$ <input style="width: 80%;" type="text"/>
Other - explain	\$ <input style="width: 80%;" type="text"/>
Other - explain	\$ <input style="width: 80%;" type="text"/>
Other - explain	\$ <input style="width: 80%;" type="text"/>
Total Expenses	\$ <input style="width: 80%;" type="text"/>
Profit/(Loss)	\$ <input style="width: 80%;" type="text"/>