

## Questionnaire

Name: \_\_\_\_\_

SSN: \*\*\*\_\*\_\*\*\*\*

## Questionnaire

## Personal Information

Yes No

- Did your marital status change during the year?  
If "Yes," explain. \_\_\_\_\_
- Did your name change during the tax year?  
If "Yes," explain. \_\_\_\_\_
- If your filing status is married, but you are filing separately from your spouse, did you and your spouse live apart for the last six months of 2023?
- Can you or your spouse be claimed as a dependent by someone else?
- Did your address change during the year?
- Were you, your spouse, or any dependents a victim of identity theft?  
If "Yes," explain. \_\_\_\_\_
- Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?  
If "Yes," provide Notice CP01A from the IRS.

**Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)**

## Dependent Information

Yes No

- Did you have any changes in dependents during the year?  
If "Yes," explain. \_\_\_\_\_
- Can another person qualify to claim any of your dependents?
- Did you have any child or dependent care expenses during the year?
- Did you have any adoption expenses during the year?
- Did you have any children under age 19 or a full-time student under age 24 with more than \$2,500 of unearned income?

**Provide documentation for proof of dependent credits (school records, medical records, daycare records, etc.)**

## Health Care Information

Yes No

- Did any member of your household have healthcare coverage through the Marketplace (Obamacare)?  
If "Yes," provide copies of Form 1095-A.
- Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

## Income, Purchases, Sales, and Debt Information

Yes No

- Did you receive any tips not reported to your employer?
- Did you receive any disability income during the year?
- Did you cash in any U.S. savings bonds during the year?
- Did you start a new business or purchase any rental property during the year?
- Did you sell an existing business, rental property, or other property during the year?
- Did you purchase any business assets or convert any assets to business use?  
If "Yes," provide the cost of the asset, the date it was placed in service, and the business use percentage.
- Did you purchase any gasoline, diesel, or special fuels for off-road business use?
- Did you buy or sell any stocks, bonds, or other investments during the year?
- Did you sell a principal residence during the year?  
If "Yes," provide closing documentation for the purchase and sale of the home.
- Did you have a principal residence or a piece of real property foreclosed on during the year?
- Did you abandon a principal residence or a piece of real property during the year?
- Did you refinance your principal home or second home or take out a home equity loan during the year?  
If "Yes," provide all escrow, closing, and other pertinent documentation and information.
- Did you receive any principal or interest during this year from property sold in prior years?

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## Questionnaire

- Did you rent out your home or use it for business?
- Did you sell, exchange, or purchase any real estate during the year?
- Did you acquire a new or additional interest in a partnership or S corporation?
- Did you have any debts canceled or forgiven this year?
- Does anyone owe you money that has become uncollectible?
- Did you purchase a new or previously owned clean vehicle (electric vehicle, plug-in hybrid, fuel-cell vehicle, qualified commercial clean vehicle) during the year?  
If "Yes," provide the report the dealer or seller is required to provide to you.
- Did you receive income or incur expenses associated with a fantasy sports league?  
If "Yes," provide documentation.
- Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?  
If "Yes," attach Form 1099-MISC, Form 1099-NEC, or Form 1099-K.
- Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)?  
If "Yes," attach Form 1099-K or Form W-2.
- Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)?  
If "Yes," provide documentation.
- Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?  
If "Yes," attach Form 1099-K.
- Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb, VRBO or HomeAway)?  
If "Yes," provide documentation.
- Did you receive income or incur expenses as an independent contractor (e.g., Shipt, Instacart, DoorDash)?  
If "Yes," provide documentation.
- Did you receive any other income you have not provided information for with this organizer?  
If "Yes," explain. \_\_\_\_\_

## Itemized Deduction Information

## Yes No

- Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?
- Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?
- Did you receive any state or local income tax refunds from prior years?
- Did you make any major purchases (vehicle, boat, etc.) during the year?
- Did you pay any real estate property taxes or personal taxes during the year?
- Did you pay mortgage interest during the year?
- Did you make cash donations to charity during the year?
- Did you make noncash donations to charity (clothes, furniture, etc.) during the year?
- Did you donate a boat or vehicle during the year?  
If "Yes," attach Form 1098-C.
- Did you have gambling winnings or losses during the year?
- Did you have any job-related expenses that were not reimbursed by your employer (uniforms, safety equipment, etc.)?
- Did you use your vehicle on the job other than for commuting to work?
- Did you work out of town at any time during the year?

## Retirement Information

## Yes No

- Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- Did you make any withdrawals or receive distributions from a pension or profit-sharing plan, IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- Did you execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- Did you receive any Social Security benefits during the year?

## Questionnaire

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## Questionnaire

## Education Information

Yes No

- Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
- Did anyone in your household attend a post-secondary school during the year?
- Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
- Did you pay student loan interest for yourself, your spouse, or your dependents during the year?  
If "Yes," provide the amount of interest that was refunded.
- Did you receive forgiveness on a qualifying federal student loan?

## Foreign Tax Information

Yes No

- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
- Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
- Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?
- Did you have any income from, or pay taxes to, a foreign country?
- Did you receive a Schedule K-3 from a partnership or S corporation?
- Did you have ownership in a foreign corporation at any time during the year?
- Did you own property in a foreign country?

## Refund, Withholding, and Estimated Tax Information

Yes No

- If you have an overpayment of 2023 taxes, do you want the refund applied to your 2024 estimated taxes?
- Did you make any estimated payments toward your 2023 taxes?
- Did you apply an overpayment of your 2022 taxes to your 2023 estimated taxes?
- Do you want to have any refund or balance due directly deposited or withdrawn?  
If "Yes," provide a canceled checking or savings slip.
- Do you anticipate your income or withholdings to be different for 2024?

## Miscellaneous Information

Yes No

- Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset?
- Did you incur a gain or loss due to damaged or stolen property, while living in a federally declared disaster area?  
If "Yes," provide the incident date, value of the property, amount of insurance reimbursements, and the declaration number assigned by FEMA.
- Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?
- Did you make gifts to any one person in excess of \$17,000 during the year?  
**Yes No**  
  If "Yes," are you splitting the gift with your spouse?
- Did you incur moving expenses with the military during the year?
- Did you make any energy-efficient improvements to your main home during the year?
- Are you a business owner who paid health insurance premiums for your employees during the year?
- Did you receive a cash payment or digital asset of more than \$10,000 in one transaction or two or more related transactions during the year?  
**Yes No**  
  If "Yes," was Form 8300, Report of Cash Payment over \$10,000 Received in Trade or Business, filed?
- Do you own interest or shares in or did you dispose of a Qualified Opportunity Fund during the year?

**Questionnaire**

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SSN: \*\*\*-\*\*-\*\*\*\*

**Questionnaire**

- Did you make any purchases subject to use tax during the year?  
If "Yes," provide details.
- Did you receive any notices from the IRS or state taxing authority?  
If "Yes," explain. \_\_\_\_\_
- May the IRS discuss your tax return with your preparer?
- Would you like a copy of your tax return sent to you electronically instead of receiving a printed copy?

**Preparer Notes**

## 2023 Tax Organizer Personal Information

### Personal Information

Name		SSN	Has IP PIN	Date of Birth
Taxpayer		***-**-****		
Spouse				
Name of person to whom all information should be addressed, if not the taxpayer				
Street address, city, state, and ZIP				
Occupation		Daytime Phone	Evening Phone	Cell Phone
Taxpayer				
Spouse				
Taxpayer email				
Spouse email				

### Filing status at the end of 2023

- Single   
  Married   
  Widowed - If widowed and your spouse died after December 31, 2021, enter the date of death \_\_\_\_\_
- Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2023? \_\_\_\_\_

### Yes No

- Are you or your spouse blind?
- Are you or your spouse disabled?
- Are you or your spouse a full-time student?
- Do you or your spouse want to designate \$3 to go to the Presidential Election Campaign Fund?
- At any time during 2023 did you:
  - (a) receive (as a reward, award, or payment for property or services) a digital asset?
  - (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

### Identification Information

#### Taxpayer's type of photo ID

- Driver's license   
  State-issued photo ID

Photo ID number \_\_\_\_\_

State photo ID was issued \_\_\_\_\_

Date photo ID was issued \_\_\_\_\_

Date photo ID expires \_\_\_\_\_

#### Spouse's type of photo ID

- Driver's license   
  State-issued photo ID

Photo ID number \_\_\_\_\_

State photo ID was issued \_\_\_\_\_

Date photo ID was issued \_\_\_\_\_

Date photo ID expires \_\_\_\_\_

### Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use this Account For	
			Checking	Savings	Deposits	Withdrawals

### Appointment Information

Your 2023 appointment is scheduled for \_\_\_\_\_

## Dependent and Other Information

Name: \_\_\_\_\_

SSN: \*\*\*-\*\*-\*\*\*\*

### Dependent Information

First and last name SSN	Has IP PIN	Relationship	Months in Home	Date of Birth	Disabled	Full- time Student	Childcare Expenses

List dependents required to file a return \_\_\_\_\_

### Estimates

	Federal		Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2022	_____	_____	_____	_____	_____	_____
First quarter	_____	_____	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____	_____	_____

### Interest Income

Name: \_\_\_\_\_

SSN: \*\*\*-\*\*-\*\*\*\*

Provide all Forms 1099-INT, 1099-OID, and statements relating to interest income

TSJ	Name of payer Account number ID and address of payer (if seller-financed mortgage)	Interest Income	Federal Income Tax Withheld	Foreign Tax Paid	Tax Exempt Interest	Amount of Resident State Municipal Interest	Nominee Interest

**Dividend Income**

Name: \_\_\_\_\_

SSN: \*\*\*-\*\*-\*\*\*\*

**Provide all Forms 1099-DIV, 1099-PATR, and statements related to dividend income**

TSJ	Name of Payer Account Number	Ordinary	Qualified	Capital Gains	Federal Income Tax Withheld	Section 199A Dividends	Foreign Tax Paid



Residential Energy Credits

Name: \_\_\_\_\_

SSN: \*\*\*-\*\*-\*\*\*\*

TSJ \_\_\_\_\_

Part I - Residential Energy Efficient Property Credit

Qualified solar electric property costs . . . . . \_\_\_\_\_

Qualified solar water heating property costs . . . . . \_\_\_\_\_

Qualified small wind energy property costs . . . . . \_\_\_\_\_

Qualified geothermal heat pump property costs . . . . . \_\_\_\_\_

Qualified battery storage technology - Does the qualified battery storage technology have a capacity of at least 3 kilowatt hours? . . . . .  Yes  No

Qualified battery storage costs . . . . . \_\_\_\_\_

Was a qualified fuel cell property installed on or in your main home in U.S.? . . . . .  Yes  No

Address of main home \_\_\_\_\_

City, state, and ZIP \_\_\_\_\_

Qualified fuel cell property costs . . . . . \_\_\_\_\_

Kilowatt capacity of qualified fuel cell property entered above . . . . . \_\_\_\_\_

Amount of unused credit from 2022 Form 5695, line 16 . . . . . \_\_\_\_\_

Part II - Energy Efficient Home Improvement Credit

Qualified Energy Efficient Improvements

Were improvements or costs made to your main home located in the US? . . . . .  Yes  No

Were you the original user of the qualified energy efficiency improvements? . . . . .  Yes  No

Are the components reasonably expected to remain in use for at least five years? . . . . .  Yes  No

Were improvements or costs related to the construction of this main home? . . . . .  Yes  No

Address of main home \_\_\_\_\_

City, state, and ZIP \_\_\_\_\_

Were improvements or costs related to the construction of this home? . . . . .  Yes  No

Cost of insulation or air sealing material or system . . . . . \_\_\_\_\_

Cost of the exterior doors: Most expensive exterior door \_\_\_\_\_ All other qualifying exterior doors \_\_\_\_\_

Cost of exterior windows and skylights . . . . . \_\_\_\_\_

Residential Energy Property Costs

Did you incur costs for qualified energy property installed on or in connection with a U.S. home? . . . . .  Yes  No

Was the qualified energy property originally placed into service by you or your spouse? . . . . .  Yes  No

Address of home that you installed qualified energy property (if more than one list separately)

Street address \_\_\_\_\_

City, state, and ZIP \_\_\_\_\_

Cost of central air conditioners . . . . . \_\_\_\_\_

Cost of natural gas, propane: Water heaters \_\_\_\_\_ Furnace or hot water boilers \_\_\_\_\_

Cost of improvements to or replacement of panelboards, subpanelboards, branch circuits, or feeders . . . . . \_\_\_\_\_

Did you incur costs for a home energy audit that included an inspection of your main home located in the U.S. and a written report prepared by a certified home energy auditor?  Yes  No Cost of home energy audit \_\_\_\_\_

Cost of electric or natural gas: Heat pumps \_\_\_\_\_ Heat pump water heaters \_\_\_\_\_

Cost of biomass stoves and boilers . . . . . \_\_\_\_\_

Schedule A - Itemized Deductions

Name: \_\_\_\_\_

SSN: \*\*\*-\*\*-\*\*\*\*

Medical and Dental Expenses

Table with 2 columns: 2023, 2022. Rows include Health insurance premiums, Medicare premiums, Long-term care premiums, Mileage driven for medical purposes, etc.

Charitable Contributions

Table with 2 columns: 2023, 2022. Rows include Donations to charity (cash), Disaster relief contributions, Miles driven for charitable purposes, etc.

Taxes Paid

Table with 2 columns: 2023, 2022. Rows include State and local income taxes, General sales tax, Real estate taxes, etc.

Other Miscellaneous Deductions

Table with 2 columns: 2023, 2022. Rows include Amortizable bond premiums, Federal estate tax, Gambling losses, etc.

Interest Paid

Table with 2 columns: 2023, 2022. Rows include Home mortgage interest paid, Home mortgage interest paid to an individual, Investment interest, etc.

For state purposes ONLY Job Expenses & Certain Miscellaneous Deductions

Table with 2 columns: 2023, 2022. Rows include Necessary job expenses you paid that were not reimbursed by your employer, Union dues, Tax preparation fees, etc.

### Casualties and Thefts

Name: \_\_\_\_\_

SSN: \*\*\*-\*\*-\*\*\*\*

TSJ \_\_\_\_\_ FEMA code \_\_\_\_\_

Property description \_\_\_\_\_

Property address \_\_\_\_\_

Property was  Personal  Business  Income-producing  Employee income-producing

Date property was acquired . . . . . \_\_\_\_\_ Fair market value before incident . . . . . \_\_\_\_\_

Cost of property damaged or stolen . . . . . \_\_\_\_\_ Fair market value after incident . . . . . \_\_\_\_\_

Insurance or other reimbursement (whether or not you filed a claim) . . . . . \_\_\_\_\_ Date property was damaged or stolen . . . . . \_\_\_\_\_

#### Theft Loss Deduction for Ponzi-Type Investment Scheme

##### Part I Computation of Deduction

Initial investment . . . . . \_\_\_\_\_ Percentage of qualified investment . . . . . \_\_\_\_\_

Subsequent investments . . . . . \_\_\_\_\_ Actual recovery . . . . . \_\_\_\_\_

Income reported in prior years . . . . . \_\_\_\_\_ Potential insurance / SIPC recovery . . . . . \_\_\_\_\_

Withdrawals . . . . . \_\_\_\_\_

##### Part II Required Statements and Declarations

Information about the person or entity that conducted fraudulent arrangements

Name \_\_\_\_\_ SSN / EIN \_\_\_\_\_

Address \_\_\_\_\_

U.S. Only: City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Foreign Only: Province / state \_\_\_\_\_ Country \_\_\_\_\_ Postal Code \_\_\_\_\_

TSJ \_\_\_\_\_ FEMA code \_\_\_\_\_

Property description \_\_\_\_\_

Property address \_\_\_\_\_

Property was  Personal  Business  Income-producing  Employee income-producing

Date property was acquired . . . . . \_\_\_\_\_ Fair market value before incident . . . . . \_\_\_\_\_

Cost of property damaged or stolen . . . . . \_\_\_\_\_ Fair market value after incident . . . . . \_\_\_\_\_

Insurance or other reimbursement (whether or not you filed a claim) . . . . . \_\_\_\_\_ Date property was damaged or stolen . . . . . \_\_\_\_\_

#### Theft Loss Deduction for Ponzi-Type Investment Scheme

##### Part I Computation of Deduction

Initial investment . . . . . \_\_\_\_\_ Percentage of qualified investment . . . . . \_\_\_\_\_

Subsequent investments . . . . . \_\_\_\_\_ Actual recovery . . . . . \_\_\_\_\_

Income reported in prior years . . . . . \_\_\_\_\_ Potential insurance / SIPC recovery . . . . . \_\_\_\_\_

Withdrawals . . . . . \_\_\_\_\_

##### Part II Required Statements and Declarations

Information about the person or entity that conducted fraudulent arrangements

Name \_\_\_\_\_ SSN / EIN \_\_\_\_\_

Address \_\_\_\_\_

U.S. Only: City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Foreign Only: Province / state \_\_\_\_\_ Country \_\_\_\_\_ Postal Code \_\_\_\_\_

**Schedule C - Profit or Loss from Business**

Name: \_\_\_\_\_

SSN: \*\*\*-\*\*-\*\*\*\*

**General Business Information**

TS \_\_\_\_\_ Professional product or service \_\_\_\_\_ Business code \_\_\_\_\_

Employer ID number \_\_\_\_\_

Business name \_\_\_\_\_

Business address \_\_\_\_\_

City \_\_\_\_\_

**U.S. only** State, ZIP \_\_\_\_\_

**Foreign only** Province / state, Country, Postal code \_\_\_\_\_

Accounting method, if not cash  Accrual  Other \_\_\_\_\_

- This business was started or acquired during 2023.
- Some investment is NOT at risk.
- This business was disposed of during 2023.

Select if this business is for:

- Professional gambler  Newspaper delivery and you are under 18 years of age
- Exempt Notary income  A clergy

- Yes No
- Payments of \$600 or more were paid to an individual, who is not your employee, for services provided for this business.
  - If "Yes," did you file Forms 1099 for the individuals?
  - Did you receive a Paycheck Protection Program (PPP) loan for this business prior to June 1, 2021?
  - If "Yes," was any portion of the loan forgiven in 2023?

**Income**

	2023	2022
Gross receipts or sales . . . . .	_____	_____
Returns and allowances . . . . .	_____	_____
Other income . . . . .	_____	_____

**Cost of Goods Sold**

Inventory method, if not cost  Lower of cost or market  Other

Change of inventory method  Yes  No

	2023	2022
Inventory at beginning of year . . . . .	_____	_____
Purchases (less cost of items withdrawn for personal use) . . . . .	_____	_____
Cost of labor . . . . .	_____	_____
Materials and supplies . . . . .	_____	_____
Other costs (list on detail worksheet) . . . . .	_____	_____
Inventory at end of year . . . . .	_____	_____

Schedule C - Profit or Loss from Business

Name: \_\_\_\_\_

SSN: \*\*\*-\*\*-\*\*\*\*

Expenses

TS \_\_\_\_\_

Business name \_\_\_\_\_

Profession or product \_\_\_\_\_

2023

2022

Advertising . . . . . \_\_\_\_\_

Car and truck expenses . . . . . \_\_\_\_\_

Commissions and fees . . . . . \_\_\_\_\_

Contract labor . . . . . \_\_\_\_\_

Depletion . . . . . \_\_\_\_\_

Employee benefit programs . . . . . \_\_\_\_\_

Insurance (other than health) . . . . . \_\_\_\_\_

Interest - mortgage (paid to banks, etc.) . . . . . \_\_\_\_\_

Interest - other . . . . . \_\_\_\_\_

Legal and professional services . . . . . \_\_\_\_\_

Office expenses . . . . . \_\_\_\_\_

Pension and profit-sharing plans . . . . . \_\_\_\_\_

Rent or lease (vehicles, machinery, and equipment) . . . . . \_\_\_\_\_

Rent (other business property) . . . . . \_\_\_\_\_

Repairs and maintenance . . . . . \_\_\_\_\_

Supplies . . . . . \_\_\_\_\_

Taxes and licenses (including real estate taxes) . . . . . \_\_\_\_\_

Travel . . . . . \_\_\_\_\_

Total meals . . . . . \_\_\_\_\_

Utilities . . . . . \_\_\_\_\_

Wages . . . . . \_\_\_\_\_

Family health coverage payments for taxpayer, spouse or dependents . . . . . \_\_\_\_\_

Other expenses (list):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**Schedule E - Income or Loss from Rental Real Estate & Royalties**

Name: \_\_\_\_\_

SSN: \*\*\*-\*\*-\*\*\*\*

**General Property Information**

TSJ \_\_\_\_\_

Property description \_\_\_\_\_

Address, city, state, ZIP \_\_\_\_\_

**Select the property type**

- |  |   |                                    |                                      |
|--|---|------------------------------------|--------------------------------------|
| <input type="checkbox"/> Single family residence | <input type="checkbox"/> Vacation / short-term rental | <input type="checkbox"/> Land      | <input type="checkbox"/> Self-rental |
| <input type="checkbox"/> Multi-family residence  | <input type="checkbox"/> Commercial                   | <input type="checkbox"/> Royalties | <input type="checkbox"/> Other _____ |

Number of days property was rented \_\_\_\_\_ Number of days property was used for personal use \_\_\_\_\_

If the rental is a multi-dwelling unit and you occupied part of the unit, enter the percentage you occupied \_\_\_\_\_

- |  |                          |                          |   |
|--|--------------------------|--------------------------|---|
| <input type="checkbox"/> This property was placed in service during 2023.      | Yes                      | No                       | <input type="checkbox"/> Payments of \$600 or more were paid to an individual, who is not your employee, for services provided for this rental. |
| <input type="checkbox"/> This property was disposed of during 2023.            | <input type="checkbox"/> | <input type="checkbox"/> |   |
| <input type="checkbox"/> This property is your main home or second home.       | <input type="checkbox"/> | <input type="checkbox"/> | If "Yes," did you file Forms 1099 for the individuals?  |
| <input type="checkbox"/> This property was owned as a qualified joint venture. | <input type="checkbox"/> | <input type="checkbox"/> |   |

**Income**

	2023	2022		2023	2022
Rent Income . . . . .	_____	_____	Royalties from oil, gas, mineral, copyright, or patent . . . . .	_____	_____

**Expenses**

	Rental Unit Expenses		Rental <u>and</u> Homeowner Expenses		
Advertising . . . . .	_____	_____	_____	_____	If this Schedule E is for a multi-unit dwelling and you lived in one unit and rented out the other units, use the "Rental and homeowner expenses" column to show expenses that apply to the entire property. Use the "Rental unit expenses" column to show expenses that pertain ONLY to the rental portion of the property.  If the Schedule E is not for a multi-unit property in which you lived in one unit, complete just the "Rental unit expenses" column.
Auto and travel . . . . .	_____	_____	_____	_____	
Cleaning and maintenance . . . . .	_____	_____	_____	_____	
Commissions . . . . .	_____	_____	_____	_____	
Insurance . . . . .	_____	_____	_____	_____	
Legal and professional fees . . . . .	_____	_____	_____	_____	
Management fees . . . . .	_____	_____	_____	_____	
Mortgage interest . . . . .	_____	_____	_____	_____	
Other interest . . . . .	_____	_____	_____	_____	
Repairs . . . . .	_____	_____	_____	_____	
Supplies . . . . .	_____	_____	_____	_____	
Taxes . . . . .	_____	_____	_____	_____	
Utilities . . . . .	_____	_____	_____	_____	
Depletion . . . . .	_____	_____	_____	_____	
Other expenses (list)	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	