

Schedule E Worksheet for Rental Property

▶ **IRS Requires us to have your information in hand to support all Schedule E's**

Rental Property #1 – Address _____

If Purchased this Year – Date ___/___/____ Initial Cost \$ _____ Improvements \$ _____

Rental Property #2 – Address _____

If Purchased this Year – Date ___/___/____ Initial Cost \$ _____ Improvements \$ _____

Rental Property #3 – Address _____

If Purchased this Year – Date ___/___/____ Initial Cost \$ _____ Improvements \$ _____

Tax Year _____

	Rental #1	Rental #2	Rental #3
Rents Received	\$ _____	\$ _____	\$ _____
Advertising	\$ _____	\$ _____	\$ _____
Cleaning and Maintenance	\$ _____	\$ _____	\$ _____
Commissions	\$ _____	\$ _____	\$ _____
H O A Dues	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____
Legal/Professional Fees	\$ _____	\$ _____	\$ _____
Management Fees	\$ _____	\$ _____	\$ _____
Mortgage Interest Paid to Banks	\$ _____	\$ _____	\$ _____
Other Interest	\$ _____	\$ _____	\$ _____
Repairs	\$ _____	\$ _____	\$ _____
Supplies	\$ _____	\$ _____	\$ _____
Taxes	\$ _____	\$ _____	\$ _____
Utilities	\$ _____	\$ _____	\$ _____
Other _____	\$ _____	\$ _____	\$ _____
Other _____	\$ _____	\$ _____	\$ _____

▶ **Business Mileage to and from Rentals** _____ mi _____ mi _____ mi

Question MUST be answered >> Do you have "evidence" to support your mileage? Yes No
and this if applicable >> If yes, is the "evidence" written? Yes No

▶ **Appliance/HVAC Purchases** \$ _____ \$ _____ \$ _____
 ▶ **Major Improvements** \$ _____ \$ _____ \$ _____

▶ **Do you have an Office in Your Home?** Yes No
 If Yes Sq Ft of Office _____ Sq Ft of Home _____
 Real Estate Taxes \$ _____ Mortgage Interest \$ _____
 HO Insurance \$ _____ Utilities \$ _____

Question MUST be answered >> Did you spend at least 250 hours on your rentals? Yes No
and this if applicable >> If yes, can you prove it to IRS if requested? Yes No

I certify that I have listed all income, all expenses, and I have documentation to prove the figures entered on this worksheet

Printed Name _____ **Signature** _____ **Date** _____