

## Schedule E Checklist

### Property Information

- Property address
- Property type (Single-family, Multi-family, Condo, Commercial, etc.)
- Ownership percentage
- Number of days rented
- Number of days used personally
- Did you actively participate? (Yes/No)
- Did you pay anyone \$600+ requiring a 1099? (Yes/No)

### Income

- Total rental income received
- 1099-K forms (if platforms issued any)
- Any other rental income (laundry, parking, storage, etc.)

### Rental Expenses

Provide totals or documents for the following:

- Advertising
- Auto & travel (local mileage or travel related to rental management)
- Cleaning & maintenance
- Commissions
- Insurance (rental property only)
- Legal & professional fees
- Management fees
- Mortgage interest (Form 1098)
- Other interest (non-mortgage loans)
- Repairs
- Supplies
- Taxes (property tax)
- Utilities (water, gas, electric, etc.)
- Depreciation (buildings, appliances, improvements)
- HOA dues
- Pest control
- Landscaping
- Snow removal

- Any other rental expenses (must be listed separately)

## **Asset Purchases**

- Date property was placed in service
- Purchase price (breakdown of land vs. building)
- Major improvements (roof, HVAC, flooring, appliances, etc.)
- Dates and amounts of improvement purchases

## **Vehicle Information (If deducting mileage)**

- Total miles for year
- Rental-related miles
- Make/model/year
- Date placed in service

## **Multiple Properties**

- Provide separate income & expense totals for **each** property
- Indicate if any properties were sold/disposed during the year
- Closing statements (if purchased or sold this year)