

## Preparer use only

## 2024 Information

## Prior Year Information

Description \_\_\_\_\_ [2]  
Taxpayer/Spouse/Joint (T, S, J) \_\_\_\_ [3] State postal code \_\_\_\_ [5]  
Physical address: Street \_\_\_\_\_ [6]  
City, state, zip code \_\_\_\_\_ [7] \_\_\_\_ [8] \_\_\_\_\_ [9]  
Foreign country \_\_\_\_\_ [11]  
Foreign province/county \_\_\_\_\_ [12]  
Foreign postal code \_\_\_\_\_ [13]  
Type (1=Single-family, 2=Multi-family, 3=Vacation/short-term, 4=Commercial, 5=Land, 6=Royalty, 7=Self-rental, 8=Other, 9=Personal ppty) [14]  
Description of other type (Type code #8) \_\_\_\_\_ [15]  
Did you make any payments in 2024 that require you to file Form(s) 1099? (Y,N) \_\_\_\_ [16] \_\_\_\_  
If "Yes", did you or will you file all required Forms 1099? (Y, N) \_\_\_\_ [18] \_\_\_\_  
Fair rental days (If not full year) (For types 1, 2, 4, 5, 7 and 8 only) (Use Rent-2 for type 3) \_\_\_\_ [20]  
Percentage of ownership if not 100% \_\_\_\_ [22]  
Business use percentage, if not 100% (Not vacation home percentage) \_\_\_\_ [24]

## Rent and Royalty Income

## Rents and royalties

## 2024 Information

## Prior Year Information

\_\_\_\_\_ + \_\_\_\_\_ [33]  
\_\_\_\_\_

## Rent and Royalty Expenses

## 2024 Information

## Percent if not 100%

## Prior Year Information

Advertising + \_\_\_\_\_ [35] \_\_\_\_\_ [36]  
Auto + \_\_\_\_\_ [38] \_\_\_\_\_ [39]  
Travel + \_\_\_\_\_ [41] \_\_\_\_\_ [42]  
Cleaning and maintenance + \_\_\_\_\_ [44] \_\_\_\_\_ [45]  
Commissions: \_\_\_\_\_ + \_\_\_\_\_ [47] \_\_\_\_\_ [49]  
\_\_\_\_\_ + \_\_\_\_\_  
Insurance: \_\_\_\_\_ + \_\_\_\_\_ [50] \_\_\_\_\_ [52]  
\_\_\_\_\_ + \_\_\_\_\_  
Legal and professional fees + \_\_\_\_\_ [54] \_\_\_\_\_ [55]  
Management fees: \_\_\_\_\_ + \_\_\_\_\_ [57] \_\_\_\_\_ [59]  
\_\_\_\_\_ + \_\_\_\_\_  
Mortgage interest paid to banks, etc (Form 1098) \_\_\_\_\_ + \_\_\_\_\_ [60] \_\_\_\_\_ [62]  
\_\_\_\_\_ + \_\_\_\_\_  
Other mortgage interest + \_\_\_\_\_ [63] \_\_\_\_\_ [65]  
Qualified mortgage insurance premiums + \_\_\_\_\_ [66] \_\_\_\_\_ [67]  
Other interest: \_\_\_\_\_ + \_\_\_\_\_ [69] \_\_\_\_\_ [71]  
\_\_\_\_\_ + \_\_\_\_\_  
Repairs + \_\_\_\_\_ [72] \_\_\_\_\_ [73]  
Supplies + \_\_\_\_\_ [75] \_\_\_\_\_ [76]  
Taxes: \_\_\_\_\_ + \_\_\_\_\_ [78] \_\_\_\_\_ [80]  
\_\_\_\_\_ + \_\_\_\_\_  
Utilities + \_\_\_\_\_ [81] \_\_\_\_\_ [82]  
Depreciation + \_\_\_\_\_ [84] \_\_\_\_\_ [85]  
Depletion + \_\_\_\_\_ [87] \_\_\_\_\_ [88]  
Other expenses: \_\_\_\_\_ + \_\_\_\_\_ [90]  
\_\_\_\_\_ + \_\_\_\_\_  
\_\_\_\_\_ + \_\_\_\_\_  
\_\_\_\_\_ + \_\_\_\_\_

Control Totals +

Form ID: Rent

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Description \_\_\_\_\_

## Refinancing Points

Preparer - Enter on Screen Rent

## 2024 Information

## Prior Year Information

## Refinancing points paid -

Recipient's/Lender's name \_\_\_\_\_ [92]  
Date of refinance \_\_\_\_\_  
Total # Payments \_\_\_\_\_  
Reported on 1098 in 2024 \_\_\_\_\_  
Total points paid \_\_\_\_\_  
Points deemed as paid in current year (Preparer use only) \_\_\_\_\_

## Refinancing points paid -

Recipient's/Lender's name \_\_\_\_\_  
Date of refinance \_\_\_\_\_  
Total # Payments \_\_\_\_\_  
Reported on 1098 in 2024 \_\_\_\_\_  
Total points paid \_\_\_\_\_  
Points deemed as paid in current year (Preparer use only) \_\_\_\_\_

## Refinancing points paid -

Recipient's/Lender's name \_\_\_\_\_  
Date of refinance \_\_\_\_\_  
Total # Payments \_\_\_\_\_  
Reported on 1098 in 2024 \_\_\_\_\_  
Total points paid \_\_\_\_\_  
Points deemed as paid in current year (Preparer use only) \_\_\_\_\_

## Vacation Home Information

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## 2024 Information

## Prior Year Information

Number of days home was used personally \_\_\_\_\_ [5]  
Number of days home was rented \_\_\_\_\_ [7]  
Number of day home owned, if not 366 \_\_\_\_\_ [9]  
Carryover of disallowed operating expenses into 2024 + \_\_\_\_\_ [21]  
Carryover of disallowed depreciation expenses into 2024 + \_\_\_\_\_ [22]

## Passive and Other Information

Preparer - Enter on Screen Rent-2

Preparer use only Carryovers	Non-QBI and Tax	For QBI & Tax	AMT
Operating	+ [24]	+ [25]	+ [26]
Short-term capital		+ [27]	+ [28]
Long-term capital		+ [29]	+ [30]
28% rate capital		+ [31]	+ [32]
Section 1231 loss	+ [33]	+ [34]	+ [35]
Ordinary business gain/loss +	[36]	+ [37]	+ [38]
Section 179	+ [39]	+ [40]	+ [41]

NOTES/QUESTIONS:

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Activity name \_\_\_\_\_

Use the comments section to provide additional information about the asset. Enter information such as vehicle mileage (total, commuting and business), the total and business square footage of home, home expenses (total and business portion). See the EXAMPLE asset below.

		Description of Asset Acquired	Date Acquired	Cost or Basis
<b>EXAMPLE</b>		2024 Model T - (EXAMPLE ASSET)	03/09/24	25,750
		Comments: 22,500 job-related miles, 25,000 total miles		
1		Comments:		
2		Comments:		
3		Comments:		
4		Comments:		
5		Comments:		
6		Comments:		
7		Comments:		
8		Comments:		
9		Comments:		
10		Comments:		
11		Comments:		
12		Comments:		
13		Comments:		
14		Comments:		
15		Comments:		
16		Comments:		
17		Comments:		
18		Comments:		
19		Comments:		
20		Comments:		
21		Comments:		
22		Comments:		
23		Comments:		
24		Comments:		
25		Comments:		

## Diligence Questions

### SELF EMPLOYMENT DILIGENCE

Description of business (*Type of work, service rendered, product sold, business location, hours of operation*) \_\_\_\_\_

EIN# \_\_\_\_\_ Any Employees? \_\_\_\_\_ # years in business \_\_\_\_\_

What kind of records do you keep? *Check mark below*

Customer receipt book		Accounting Records		Business Stationary	
Paid expense receipts		Log Books		Car Travel log	
Computer records		Business Bank Acct		Car/Truck Expense	
Ledgers		Suppliers		Client Statements	
Advertising		Rental Expense		Insurance	
Form 1099 Misc received		Form 1099 Misc issued		Other:	

Business Phone \_\_\_\_\_ Business Website \_\_\_\_\_

Business Address \_\_\_\_\_

How do you advertise? \_\_\_\_\_

Do you have a license? \_\_\_\_\_ Is a license required for your occupation? \_\_\_\_\_

Did you file state and/or local sales tax returns for the tax year? \_\_\_\_\_

How Did you calculate your income? \_\_\_\_\_

How Did you calculate your expenses? \_\_\_\_\_

If you do not have any business expenses, explain why \_\_\_\_\_

Preparer Notes: \_\_\_\_\_

Taxpayer Signature (Business Owner/Subcontractor) \_\_\_\_\_ Date \_\_\_\_\_



## MILEAGE

DISCUSSED WITH TAXPAYER THE MEHOD OF RECORDKEEPING FOR MILEAGE AND GAVE TAXPAYER A CALENDAR TO LOG IN DAILY MILEAGES FOR BUSINESS PURPOSES. DISCUSSED WITH TAXPAYER THE WAY TO LOG BEGINNING OF YEAR AND END OF YEAR ODOMETER READINGS.

WENT OVER THE REQUIREMENT OF NEEDING 3<sup>RD</sup> PARTY VERIFICATION FOR ODOMETER READINGS. (SAVED PROOF OF SERVICE RECORDS)

WENT OVER THE STANDARD MILEAGE RATE AND WHAT EXPENSES IT COVERS SUCH AS REPAIRS, LICENSE, FLUIDS, FUEL, ETC. THE ONLY EXPENSE THAT CAN BE USED IN ADDITION TO THE STANDARD MILEAGE RATE IS INTEREST PAID ON A LOAN FOR THE VEHICLE IF IN THE CASE OF THE SCHDEULE C TAXPAYER.

SIGNATURES:

TAXPAYER: \_\_\_\_\_ DATE: \_\_\_\_\_

SPOUSE: \_\_\_\_\_ DATE: \_\_\_\_\_

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