

## Schedule E - Rental Real Estate

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

### General Property Information

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

Address, city, state, zip: \_\_\_\_\_

### Select the property type

- Single family residence       Vacation/Short-term rental       Land       Self-Rental  
 Multi-family residence       Commercial       Royalties       Other \_\_\_\_\_

- This property is your main home       Yes     No      Payments of \$600 or more were paid to an individual who is not your employee for services provided.  
 This property was sold this year       Yes     No      You filed Form(s) 1099 for the individual(s).  
 This property was refinanced this year

### Income

Rent Income..... \_\_\_\_\_ # of days property was rented \_\_\_\_\_

Royalties..... \_\_\_\_\_ # of days for personal use \_\_\_\_\_

NOTE: Please provide all 1099-MISC forms received for rental and royalty income      % of ownership \_\_\_\_\_  
% of personal use (if any) \_\_\_\_\_

### Expenses

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

Auto & Travel (see attached)..... \_\_\_\_\_

Cleaning & maintenance..... \_\_\_\_\_

Commissions & Fees..... \_\_\_\_\_

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

Insurance ..... \_\_\_\_\_

Property management fees..... \_\_\_\_\_

Interest - mortgage..... \_\_\_\_\_

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

Legal & professional services..... \_\_\_\_\_

Repairs..... \_\_\_\_\_

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

Taxes..... \_\_\_\_\_

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

Other expenses:  
\_\_\_\_\_  
\_\_\_\_\_

If you purchased, sold, or refinanced this property during the year please be sure to include the final escrow closing statement.

If you used your auto or part of your home in connection with management of your rental property, please provide additional details on the attached schedule.

**Auto Deduction**

Please provide information about a vehicle(s) used for your rental activity.

	<u>Vehicle 1</u>	<u>Vehicle 2</u>
Date placed in service	_____	_____
Description (Make/Model/Yr)	_____	_____
Total miles for year	_____	_____
Business miles	_____	_____
Commuting miles	_____	_____
Written evidence (Y or N)?	_____	_____
DMV fees	_____	_____
Loan interest	_____	_____
Parking/Tolls	_____	_____

**Home Office Deduction**

If you use a portion of your home regularly and exclusively for business, please provide the following information in order to properly calculate the deduction.

Total sq ft of home \_\_\_\_\_

Sq ft of space used for business \_\_\_\_\_

Provide 100% of household expenses. We will apply the appropriate business % on your tax return:

Mortgage interest	Form 1098	_____
Real estate taxes		_____
Insurance		_____
Rent		_____
Repairs & maintenance		_____
Utilities		_____
HOA		_____
Purchase price of home		_____