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924 JEFFERSON ST KERRVILLE TX 78028 | KBS@KERRBSI.COM | 830-257-7733

Schedule E (Rental Real Estate) – Taxpayer Checklist

Use this checklist to gather the information needed to prepare Schedule E (Part I).

General Information

- Number of rental properties
- State(s) where properties are located
- Ownership percentage (if not 100%)
- Any changes from the prior year

Property Information (Complete for Each Property)

- Property address
- Date property placed in service
- Property type (single-family, multi-family, commercial, land, etc.)
- Number of days rented at fair rental value
- Number of personal-use days (if any)

Rental Income

- Gross rental income received
- Advance or prepaid rent
- Other rental-related income (fees, reimbursements, etc.)

Rental Expenses

- Advertising
- Auto and travel (rental-related only)
- Cleaning and maintenance
- Commissions
- Insurance
- Legal and professional fees
- Management fees
- Mortgage interest
- Repairs
- Supplies
- Property taxes



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Utilities
HOA or condo fees
Other rental expenses

Depreciation and Improvements

Original purchase price
Land vs. building allocation (if known)
Improvements made during the year (dates and costs)

Property Sales or Dispositions

Property sold or disposed of during the year
Date of sale
Gross sales price
Selling expenses

Additional Information

Personal use of rental property (if any)
Short-term rental activity (Airbnb, VRBO, etc.)
Any IRS or state notices related to rental activity