



BOOKKEEPING
TAXES
PAYROLL
BUSINESS CONSULTING

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



BOOKKEEPING
TAXES
PAYROLL
BUSINESS CONSULTING

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

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