

Schedule E Worksheet for Rental Property

▶ IRS Requires us to have **your information** in hand to support all Schedule E's

Rental Property #1 - Address _____

If Purchased this Year - Date ___/___/___ Initial Cost \$ _____ Improvements \$ _____

Rental Property #2 - Address _____

If Purchased this Year - Date ___/___/___ Initial Cost \$ _____ Improvements \$ _____

Rental Property #3 - Address _____

If Purchased this Year - Date ___/___/___ Initial Cost \$ _____ Improvements \$ _____

Tax Year _____

	Rental #1	Rental #2	Rental #3
Rents Received	\$ _____	\$ _____	\$ _____
Advertising	\$ _____	\$ _____	\$ _____
Cleaning and Maintenance	\$ _____	\$ _____	\$ _____
Commissions	\$ _____	\$ _____	\$ _____
H O A Dues	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____
Legal/Professional Fees	\$ _____	\$ _____	\$ _____
Management Fees	\$ _____	\$ _____	\$ _____
Mortgage Interest Paid to Banks	\$ _____	\$ _____	\$ _____
Other Interest	\$ _____	\$ _____	\$ _____
Repairs	\$ _____	\$ _____	\$ _____
Supplies	\$ _____	\$ _____	\$ _____
Taxes	\$ _____	\$ _____	\$ _____
Utilities	\$ _____	\$ _____	\$ _____
Other _____	\$ _____	\$ _____	\$ _____
Other _____	\$ _____	\$ _____	\$ _____

▶ Business Mileage to and from Rentals _____ mi _____ mi _____ mi

Question MUST be answered >> Do you have "evidence" to support your mileage? Yes No
 and this if applicable >> If yes, is the "evidence" written? Yes No

▶ Appliance/HVAC Purchases \$ _____ \$ _____ \$ _____
 ▶ Major Improvements \$ _____ \$ _____ \$ _____

▶ Do you have an Office in Your Home? Yes No

If Yes Sq Ft of Office _____ Sq Ft of Home _____

Real Estate Taxes \$ _____ Mortgage Interest \$ _____

HO Insurance \$ _____ Utilities \$ _____

Question MUST be answered >> Did you spend at least 250 hours on your rentals? Yes No
 and this if applicable >> If yes, can you prove it to IRS if requested? Yes No

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I certify that I have listed all income, all expenses, and I have documentation to prove the figures entered on this worksheet

Printed Name _____ Signature _____ Date _____