

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 _____ 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 handle all issues with each rental? ☐ Yes ☐ No
and this if applicable >> If yes, can you prove it to IRS if requested? ☐ Yes ☐ No

← I certify that I have listed all income, all expenses, and I have documentation to prove the figures entered on this worksheet for preparation of my income tax return.

Printed Name _____ Signature _____ Date _____