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 >> Do 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_____