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 _____

	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

"Evidence" includes mileage logs, appointment records, calendars, etc. plus IRS could ask for odometer readings from oil changes, repair invoices, purchase and sale documents.

► 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 $_____

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

Printed Name_____ Signature_____ Date_____