

# 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
<b>Rents Received</b>	\$ _____	\$ _____	\$ _____
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 \_\_\_\_\_