

# 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
<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

▶ 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 \_\_\_\_\_