



Schedule E - Rental Real Estate

Client Name: _____

General Property Information

Property description: _____

Address, city, state, zip: _____

Select the property type

- Single family residence
- Multi-family residence
- Vacation/Short-term rental
- Commercial
- Land
- Royalties
- Self-Rental
- Other _____

This property is your main home Yes No

This property was sold this year Yes No

This property was refinanced this year Yes No

Payments of \$600 or more were paid to an individual who is not your employee for services provided.

You filed Form(s) 1099 for the individual(s).

Income

2020

Rent Income..... _____ # of days property was rented _____

Royalties..... _____ # of days for personal use _____

NOTE: Please provide all 1099-MISC forms received for rental and % of ownership _____

royalty income % of personal use (if any) _____

Expenses

2020

Advertising..... _____

Auto & Travel (see attached)..... _____

Cleaning & maintenance..... _____

Commissions & Fees..... _____

Depletion..... _____

Insurance _____

Property management fees..... _____

Interest - mortgage..... _____

Interest - other..... _____

Legal & professional services..... _____

Repairs..... _____

Supplies..... _____

Taxes..... _____

Utilities..... _____

Other expenses: _____

If you purchased, sold, or refinanced this property during the year please be sure to include the final escrow closing statement.

If you used your auto or part of your home in connection with management of your rental property, please provide additional details on the attached schedule.

Auto Deduction

Please provide information about a vehicle(s) used for your rental activity.

	<u>Vehicle 1</u>	<u>Vehicle 2</u>
Date placed in service	_____	_____
Description (Make/Model/Yr)	_____	_____
Total miles for year	_____	_____
Business miles	_____	_____
Commuting miles	_____	_____
Written evidence (Y or N)?	_____	_____
DMV fees	_____	_____
Loan interest	_____	_____
Parking/Tolls	_____	_____

Home Office Deduction

If you use a portion of your home regularly and exclusively for business, please provide the following information in order to properly calculate the deduction.

Total sq ft of home
Sq ft of space used for business

Provide 100% of household expenses. We will apply the appropriate business % on your tax return:

Mortgage interest	<u>Form 1098</u>
Real estate taxes	_____
Insurance	_____
Rent	_____
Repairs & maintenance	_____
Utilities	_____
HOA	_____
Purchase price of home	_____