



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 Payments of \$600 or more were paid to an individual who is not your employee for services provided.
- This property was sold this year Yes No You filed Form(s) 1099 for the individual(s).
- This property was refinanced this year

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 royalty income		% of ownership	_____
		% of personal use (if any)	_____

Expenses

2020

Advertising.....	_____	If you purchased, sold, or refinanced this property during the year please be sure to include the final escrow closing statement.
Auto & Travel (see attached).....	_____	
Cleaning & maintenance.....	_____	
Commissions & Fees.....	_____	
Depletion.....	_____	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.
Insurance	_____	
Property management fees.....	_____	
Interest - mortgage.....	_____	
Interest - other.....	_____	
Legal & professional services.....	_____	
Repairs.....	_____	
Supplies.....	_____	
Taxes.....	_____	
Utilities.....	_____	
Other expenses:		
_____	_____	
_____	_____	

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	_____