

Rental Property Income (Schedule E)

RESIDENCE CHANGE

► If you changed residences during the year, provide period of residence in each location.

Residence #1 _____ From ___/___/___ To ___/___/___

Own ____ Rent ____

Residence #2 _____ From ___/___/___ To ___/___/___

Own ____ Rent ____

RENTAL AND ROYALTY INCOME — Complete a separate schedule for each property.

YES NO

► 1) Description and location of property: _____

► 2) Type of property:

- | | | |
|--------------------|--------------------------|--------------------------|
| Personal use? | <input type="checkbox"/> | <input type="checkbox"/> |
| Residential rental | <input type="checkbox"/> | <input type="checkbox"/> |
| Commercial rental | <input type="checkbox"/> | <input type="checkbox"/> |
| Royalty | <input type="checkbox"/> | <input type="checkbox"/> |
| Self-rental | <input type="checkbox"/> | <input type="checkbox"/> |
| Other — Describe | <input type="checkbox"/> | <input type="checkbox"/> |

If personal use yes:

a) Number of days the property was occupied by you, a member of your family, or any individual not paying rent at the fair market value. _____

b) Number of days the property was not occupied. _____

If not occupied, was it available for rent during this time?

c) Number of days the property was not occupied. _____

► 3) Did you actively participate in the operation of the rental property during the year?

a) Were more than half of personal services that you or your spouse performed during the year performed in real property trades?

b) Did you or your spouse perform more than 750 hours of services during the year in real property trades or businesses?

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▶ 4) Did you make any payments during the year that would require you to file Form(s) 1099?

If yes, did you file the Form(s) 1099?

INCOME:	AMOUNT		AMOUNT
RENTS RECEIVED		ROYALTIES RECEIVED	
EXPENSES:			
MORTGAGE INTEREST		LEGAL AND OTHER PROFESSIONAL FEES	
OTHER INTEREST		CLEANING AND MAINTENANCE	
INSURANCE		COMMISSIONS	
REPAIRS		UTILITIES	
AUTO AND TRAVEL		MANAGEMENT FEES	
ADVERTISING		SUPPLIES	
TAXES		OTHER (ITEMIZE)	

▶ If this is the first year we are preparing your return, provide depreciation records.

▶ If this is a new property, provide the closing statement (HUD-1).

▶ List below any improvements or assets purchased during the year.

DESCRIPTION	DATE PLACED IN SERVICE	COST

▶ If the property was sold during the year, provide the closing statement (HUD-1).

▶ If this is an Air BnB rental, please provide the earning report from the Air BnB online portal and your 1099-K.