

## Schedule E Worksheet for Rental Property

**Client Name:** \_\_\_\_\_

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 \_\_\_\_\_

	<b>Rental #1</b>	<b>Rental #2</b>	<b>Rental #3</b>
Days Rented	_____	_____	_____
<b>Rents Received</b>	\$ _____	\$ _____	\$ _____
<b>EXPENSES</b>			
Advertising	\$ _____	\$ _____	\$ _____
Cleaning & Maintenance	\$ _____	\$ _____	\$ _____
Commissions	\$ _____	\$ _____	\$ _____
H O A Dues	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____
Legal/Professional Fees	\$ _____	\$ _____	\$ _____
Interest – Mortgage	\$ _____	\$ _____	\$ _____
Interest – Other	\$ _____	\$ _____	\$ _____
Repairs	\$ _____	\$ _____	\$ _____
Supplies	\$ _____	\$ _____	\$ _____
Taxes	\$ _____	\$ _____	\$ _____
Utilities	\$ _____	\$ _____	\$ _____
Other _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
Appliance / HVAC Purchases	\$ _____	\$ _____	\$ _____
Major Improvements	\$ _____	\$ _____	\$ _____
*Date placed in service:	_____	_____	_____
*Description:	_____	_____	_____

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 \$ \_\_\_\_\_

	Rental #1	Rental #2	Rental #3
Business Mileage to & from Rentals	_____mi	_____mi	_____mi

Do you have evidence to support your mileage?  Yes  No

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.**