

## Rental Property Worksheet

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

**General Property Information**

Property description \_\_\_\_\_  
 Address, city, state, ZIP \_\_\_\_\_

**Select the property type**

- |  |   |                                    |                                      |
|--|---|------------------------------------|--------------------------------------|
| <input type="checkbox"/> Single family residence | <input type="checkbox"/> Vacation / short-term rental | <input type="checkbox"/> Land      | <input type="checkbox"/> Self-rental |
| <input type="checkbox"/> Multi-family residence  | <input type="checkbox"/> Commercial                   | <input type="checkbox"/> Royalties | <input type="checkbox"/> Other _____ |

Number of days property was rented \_\_\_\_\_ Number of days property was used for personal use \_\_\_\_\_

If the rental is a multi-dwelling unit and you occupied part of the unit, enter the percentage you occupied \_\_\_\_\_

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> This property is your main home or second home       | <input type="checkbox"/> Yes <input type="checkbox"/> No | Payments of \$600 or more were paid to an individual who is not your employee for services provided for this rental |
| <input type="checkbox"/> This property was disposed of during 2019            | <input type="checkbox"/> Yes <input type="checkbox"/> No | You filed Forms 1099 for the individuals  |
| <input type="checkbox"/> This property was owned as a qualified joint venture |  |   |

**Income**

	<b>2022</b>		<b>2022</b>
Rent income .....	_____	Royalties from oil, gas, mineral, copyright or patent .....	_____

**Expenses**

	Rental unit expenses	Rental and homeowner expenses
Advertising .....	_____	_____
Auto & travel .....	_____	_____
Cleaning & maintenance .....	_____	_____
Commissions .....	_____	_____
Insurance .....	_____	_____
Legal & professional fees .....	_____	_____
Management fees .....	_____	_____
Mortgage interest .....	_____	_____
Other interest .....	_____	_____
Repairs .....	_____	_____
Supplies .....	_____	_____
Taxes .....	_____	_____
Utilities .....	_____	_____
Depletion .....	_____	_____
Other expenses .....	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
Date this property became a rental .....	_____	_____
Value of land on this Date .....	_____	_____
Value of structure & improvements on this date .....	_____	_____

If this Schedule E is for a multi-unit dwelling and you lived in one unit and rented out the other units, use the "Rental and homeowner expenses" column to show expenses that apply to the entire property. Use the "Rental unit expenses" column to show expenses that pertain ONLY to the rental portion of the property.

If the Schedule E is not for a multi-unit property in which you lived in one unit, complete just the "Rental unit expenses" column.