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Your tax, our task!
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Schedule E Worksheet

GENERAL INFO

Type of Property: _____

Location of Property: _____

_____

➔ If purchased or refinanced last year, attach settlement sheet.

List percentage of ownership: _____ %

If property is a vacation home:

- Number of days home used personally: _____
- Number of days home was rented at fair market value: _____
- Number of days home owned (if not 365): _____

Income

Rents or royalties received	

Expenses

	Direct		
Advertising		Painting and decorating	
Association dues		Pest control	
Auto and Travel [A]		Plumbing and electrical	
Federal		Repairs	
State, if different (CA only)		Supplies	
Cleaning and maintenance		**Taxes**	
Commissions		Real estate	
Gardening		Other [A]	
Insurance (except PMI)		Telephone	
Legal and professional fees		Utilities	
Licenses and permits		Wages and salaries	
Management fees		Other expenses (Ctrl+E)	
Miscellaneous		_____	
Interest		_____	
Mortgage - banks, etc. (Form 1098) [A]		_____	
Qualified mortgage insurance premiums (after limitation)		_____	
Excess mortgage interest [A]		_____	
Other [A]		_____	

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