

Schedule E - Income or Loss from Rental Real Estate & Royalties

Name: _____

SSN: _____

General Property Information

TSJ _____

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 was placed in service during 2022. | Yes | 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 2022. | <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> This property is your main home or second home. | <input type="checkbox"/> | <input type="checkbox"/> | If "Yes," did you file Forms 1099 for the individuals? |
| <input type="checkbox"/> This property was owned as a qualified joint venture. | <input type="checkbox"/> | <input type="checkbox"/> | |

Income

	2022	2021		2022	2021
Rent Income			Royalties from oil, gas, mineral, copyright or patent		

Expenses

	Rental unit expenses		Rental <u>and</u> homeowner expenses	
Advertising				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.
Auto & travel				
Cleaning & maintenance				
Commissions				
Insurance				
Legal & professional fees				
Management fees				
Mortgage interest				
Other interest				
Repairs				
Supplies				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.
Taxes				
Utilities				
Depletion				
Other expenses (list)				

Expenses Related to Business

Name: _____

SSN: _____

Auto Expense

Name of business vehicle is used for _____

Description of vehicle _____ Date vehicle was placed in service _____

Yes No
 Was this vehicle available for use during off-duty hours?
 Was another vehicle is available for personal use?

Yes No
 Do you have evidence to support your deduction?
 If "Yes," is the evidence written?

Number of miles the vehicle was driven during 2022	2022		2021	Total number of miles the vehicle was driven in prior years	2022		2021
Business: Before July 1	_____		_____	Business	_____		_____
After June 30	_____		_____	Total	_____		_____
Commuting	_____		_____				
Other	_____		_____				

Expenses	2022		2021		2022		2021
Garage rent	_____		_____	Repairs	_____		_____
Gas	_____		_____	Tires	_____		_____
Insurance	_____		_____	Tolls	_____		_____
Licenses	_____		_____	Lease addback	_____		_____
Oil	_____		_____	Other expenses			_____
Parking fees	_____		_____	_____	_____		_____
Rental fees	_____		_____	_____	_____		_____
Interest	_____		_____	_____	_____		_____
Property tax	_____		_____				

Business Use of Home

Name of business home is used for _____

What is the total square footage of your home that was used regularly and exclusively for business? _____

What is the total square footage of your home? _____

For daycare facilities not used exclusively for business, complete the following questions:

How many days during the year was the area used? _____ How many hours per day was the area used? _____

The daycare facility was in operation for the entire year

Expenses		Office expenses		Home expenses	
		2022	2021	2022	2021
Mortgage interest	_____	_____	_____	_____	_____
Real estate taxes	_____	_____	_____	_____	_____
Excess mortgage interest	_____	_____	_____	_____	_____
Excess real estate taxes	_____	_____	_____	_____	_____
Insurance	_____	_____	_____	_____	_____
Rent	_____	_____	_____	_____	_____
Repairs & maintenance	_____	_____	_____	_____	_____
Utilities	_____	_____	_____	_____	_____
Other expenses	_____	_____	_____	_____	_____

In the "Office expenses" column, enter those expenses that pertain exclusively to your office; in the "Home expenses" column, enter those expenses that pertain to the entire dwelling.

