

Schedule E Worksheet

GENERAL INFO

Type of Property (check one): Single family residence Commercial
 Multi-family residence Land
 Vacation / short-term rental Self-rental
 Other: _____

Physical Address of Property: _____

➔ If purchased or refinanced in 2023, 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 Received: \$ _____ (provide any 1099 Misc forms received)

EXPENSES

Advertising: \$ _____
 Auto: \$ _____ (complete Vehicle Information Questionnaire)
 Travel: \$ _____
 Cleaning & Maintenance: \$ _____
 Commissions: \$ _____
 Insurance: \$ _____
 Legal & Professional: \$ _____
 Management Fees: \$ _____
 Mortgage Interest: \$ _____ (provide Form 1098)
 Other mortgage interest: \$ _____ (not reported on Form 1098)
 Qualified mortgage insurance: \$ _____
 Other interest: \$ _____
 Repairs: \$ _____ (provide details on separate sheet)
 Supplies: \$ _____
 Taxes – Real Estate: \$ _____
 Taxes – Other: \$ _____
 Utilities: \$ _____
 Condo or Homeowner's Fees: \$ _____
 Licenses and Permits: \$ _____
 Other: \$ _____ (provide details on separate sheet)
TOTAL EXPENSES: \$ _____