



**SCHEDULE E CHECKLIST
RENTS, ROYALTIES**

CLIENT NAME _____

Business Name _____

Business Address _____

Employer identification number (EIN), if any _____

PROPERTY TYPE _____ (choose from this list)

Single Family Residence	Land
Multi-Family Residence	Royalties
Vacation / Short term	Self-Rental or
Commercial	Other

PHYSICAL ADDRESS _____

CITY _____ STATE _____ ZIP _____

Did you make any payments that would require you to file Form(s) 1099? Yes _____ No _____

If yes, did you or will you file all required Form(s) 1099? Yes _____ No _____

**Please provide a copy of Form 1096.

Days rented at fair rental value _____ Days of personal use _____

Check all that Apply:

Owned by spouse	_____
Owned jointly	_____
Active participation	_____
Material participation	_____
Qualified joint venture	_____
Some investment not at risk	_____

Ownership Percentage:

Enter ownership percentage _____ %

Owner-Occupied Rentals:

Percentage of rental use _____ %

Vacation Home or Property with

Personal Use Days:

Number of days property owned if
less than an entire year _____

PLEASE GO TO PAGE 2 FOR SCHEDULE E WORKSHEET

SCHEDULE E - RENTAL PROPERTY or ROYALTIES

CHECK FOR AND SUBMIT ALL APPLICABLE INFORMATION

INCOME - RENTS OR ROYALTIES

Rental Income <u>(not reported on 1099)</u>	\$ _____
Rents from 1099-MISC	\$ _____
Royalties received <u>(not reported on 1099)</u>	\$ _____
Royalties received 1099-MISC and K-1 Worksheets	\$ _____
Payments received through merchant cards (1099-K)	\$ _____

EXPENSES - Proof of Purchase required--receipts

Advertising	\$ _____
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Car & Truck Expenses >>> Please provide make & model of vehicle and when placed in service. In order to take an auto expense, you must provide both a mileage log and receipts for expenses which could include gas, oil, repairs, registration, lease or rental fees, insurance, etc.

TOTAL MILEAGE	_____
BUSINESS MILEAGE	_____
Vehicle Make & Model	_____
Date Placed in Service	_____
Car & Truck Expenses	\$ _____

Travel	\$ _____
Cleaning and Maintenance	\$ _____
Commissions	\$ _____
Mortgage Insurance Qualified	\$ _____
Other Insurance	\$ _____
Legal and Professional Fees	\$ _____
Management Fees	\$ _____
Mortgage Interest Qualified	\$ _____
Mortgage Interest Other	\$ _____
Other Interest	\$ _____
Repairs -(includes materials & labor)	\$ _____
Supplies	\$ _____
Real Estate Taxes	\$ _____
Other Taxes	\$ _____
Utilities	\$ _____
Other Expenses	\$ _____
a)	\$ _____
b)	\$ _____
c)	\$ _____
d)	\$ _____
e) Indirect Operating Expense	\$ _____
e) Operating Expense Carryover	\$ _____
f) Depreciation	\$ _____
g) Amortization	\$ _____