

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 2025, 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:	\$ _____	