

## 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 2024, 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:** \$ \_\_\_\_\_