

2021

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

Name: Client Name

SSN:

General Property Information

Property description _____

Address, city, state, ZIP _____

Select the property type

- Single family residence Vacation / short-term rental Land Self-rental
- Multi-family residence Commercial Royalties 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 _____

- This property was placed in service during 2021.
- This property is your main home or second home. Yes No Payments of \$600 or more were paid to an individual who is not your employee for services provided for this rental.
- This property was disposed of during 2021.
- This property was owned as a qualified joint venture. Yes No You filed Forms 1099 for the individuals

Income

| | 2021 | | 2021 |
|-----------------------|-------|---|-------|
| Rent income | _____ | Royalties from oil, gas, mineral, copyright or patent | _____ |

Expenses

| | Rental unit expenses | Rental and 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 | _____ | _____ | |
| Taxes | _____ | _____ | |
| Utilities | _____ | _____ | |
| Depletion | _____ | _____ | |
| Other expenses | _____ | _____ | |
| _____ | _____ | _____ | |
| _____ | _____ | _____ | |
| _____ | _____ | _____ | |
| _____ | _____ | _____ | |