Rental property worksheet

For Schedule E. One column for each property, up to three. The IRS expects you to have records that support every amount.

Your properties

Property	Address	Type (house, condo...)	Date bought	Purchase price
1				
2				
3				

Property	Days rented this year	Days you used it yourself	Your ownership %	Improvements this year $
1				
2				
3				

Income and expenses for the year

Tax year

Owner name

	Property 1 $	Property 2 $	Property 3 $
Rents received			
Advertising			
Cleaning and maintenance			
Commissions			
HOA or condo dues			
Insurance			
Legal and professional fees			
Management fees			
Mortgage interest paid to banks			
Other interest			
Repairs			
Supplies			
Real estate taxes			
Utilities			
Travel and mileage to the property			
Other:			
Other:			

Larger purchases

Appliances, heating and cooling systems, roofs and other improvements are deducted over several years. List each one.

Property	What was bought or improved	Date	Cost

Did you buy or sell a rental property this year? (Bring the closing statement.) ☐ Yes ☐ No

Did you live in any of these properties during the year? ☐ Yes ☐ No

Did you pay contractors or a manager who may need a Form 1099? ☐ Yes ☐ No

Was any property vacant or not available for rent for part of the year? ☐ Yes ☐ No

I confirm that the information on this worksheet is complete and correct to the best of my knowledge, and that I have records to support it. I understand that my preparer relies on what I provide and may ask reasonable questions about it, and that if the IRS or a state examines my return, it is my responsibility to produce those records.

Signature _____ **Printed name** _____ **Date** _____