

# SCH E WORKSHEET



CLIENT NAME:

TAX YEAR:

THE PHYSICAL ADDRESS OF EACH PROPERTY  
(STREET, CITY, STATE, ZIP CODE)

- 1. Single Family Residence
- 2. Multi-Family Residence
- 3. Vacay/Short-Term Rental
- 5. Commercial
- 6. Royalties
- 7. Land

PROPERTY A				TYPE OF PROPERTY					
				A		B			
PROPERTY B				A					
PROPERTY C				B					
A      B      C				C					
IS THIS PROPERTY MY PRIMARY HOME?	YES	NO	YES	NO	YES	NO	DID YOU MAKE ANY PAYMENTS REQUIRING YOU TO FILE FORM(S) 1099?      YES      NO  DID YOU OR WILL YOU FILE THE REQUIRED FORM(S) 1099?      YES      NO		
NUMBER OF DAYS PROPERTY WAS RENTED?									
NUMBER OF DAYS PROPERTY WAS USED FOR PERSONAL USE?									
PROPERTY INCOME									
							A	B	C
RENTS RECEIVED									
ROYALTIES RECEIVED									

# SCH E EXPENSE WORKSHEET

## PROPERTY EXPENSES

	A	B	C
ADVERTISING OFFICE/ SHIPPING EXPENSE			
AUTO & TRAVEL TO PROPERTY GAS/INS./REPAIRS/PARKING/TOLLS			
CLEANING & MAINTENANCE			
COMMISSIONS			
INSURANCE/HOMEOWNER			
LEGAL AND PROFESSIONAL FEE			
MANAGEMENT FEES			
UTILITIES HEAT/WATER/ELECTRICITY			
TELEPHONE FOR PROPERTY			
LANDSCAPING/ GARDENER			
WATER AND SEWER			
REPAIRS			
SUPPLIES			
SECURITY SYSTEM			
PEST CONTROL			
DEPRECIATION EXPENSE			
DEPLETION			
OTHER:			
OTHER:			

# SCH E EXPENSE WORKSHEET

CAN YOU PROVIDE DOCUMENTATION BELOW TO SUBSTANTIATE YOUR EXPENSES?

- UTILITY BILLS
- REPAIR RECEIPTS
- MILEAGE RECEIPTS
- MISCELLANEOUS RECEIPTS

- MORTGAGE STATEMENT
- PROPERTY TAX STATEMENT
- INSURANCE STATEMENT

BY SIGNING THIS FORM, I CONFIRM THAT I HAVE PROVIDED **MJS & ASSOCIATE** WITH ACCURATE INFORMATION, SUPPORTED BY THE NECESSARY DOCUMENTS. I HAVE ENSURED THAT I RETAIN ALL THE DOCUMENTS AND OTHER DATA THAT FORM THE BASIS OF MY EXPENSES ON THIS RETURN. THIS INCLUDES RECEIPTS, BILLS, STATEMENTS, AND OTHER RELEVANT DOCUMENTS.

"I DECLARE UNDER PENALTY OF PERJURY THAT THE INFORMATION PROVIDED, WHETHER WRITTEN OR VERBAL, IS TRUE AND ACCURATE. THIS MEANS THAT I AM LEGALLY BOUND TO ENSURE THAT THE INFORMATION PROVIDED IS TRUTHFUL AND CORRECT. FALSIFYING OR MISREPRESENTING INFORMATION COULD RESULT IN CIVIL OR CRIMINAL PENALTIES."

THIS DOCUMENT EXECUTED ON \_\_\_\_\_

PRINT NAME: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

*As per the IRS, it is mandatory to report all income you receive, regardless of the source. You must also keep and maintain records to support all the items mentioned on your return. For claiming deductions related to charitable contributions, travel, auto mileage, computer use, etc., specific written records are necessary. At MJS & Associates, we are your advisors and preparers, but you are ultimately responsible for your return accuracy and overall correctness.*