

Rental/Royalty Income and Expenses

If more than two properties, please copy this form.

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► Name/s of Owner/s:

A Did you make any payments that would require you to file Form(s) 1099? YES NO Answer no and leave B blank unless you are a Real Estate Professional.
B If "Yes" did you or will you file all required 1099 forms YES NO

Description	Property A	Property B
Please check type of Income: If royalty (1099-Misc, box 2) go to line 4	<input type="checkbox"/> RENTAL <input type="checkbox"/> ROYALTY	<input type="checkbox"/> RENTAL <input type="checkbox"/> ROYALTY
1a Rental Property Street Address:		
Rental Property City and State:		
1b Check box below that describes type of property: <input type="checkbox"/> 1 SINGLE FAMILY RESIDENCE <input type="checkbox"/> 2 MULTI-FAMILY RESIDENCE <input type="checkbox"/> 3 VACATION SHORT-TERM RENTAL <input type="checkbox"/> 4 COMMERCIAL <input type="checkbox"/> 5 LAND <input type="checkbox"/> 6 ROYALTIES <input type="checkbox"/> 7 SELF-RENTAL <input type="checkbox"/> 8 OTHER (DESCRIBE)		
1c Owners: please check (T) Taxpayer (S) Spouse or (J) Joint	<input type="checkbox"/> T <input type="checkbox"/> S <input type="checkbox"/> J	<input type="checkbox"/> T <input type="checkbox"/> S <input type="checkbox"/> J
1d Did you sell this property? If yes, see next page Sheet 4.	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
1e Did you have a personal residence in the building? If no, go to 2a♦	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
1f Square footage of: Rental Apt(s) / Building / Percentage Rental ❖		
2a Is this a Vacation Home? If no, skip to line 3b.	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
2b Did you / your family occupy this property at any time during the year?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
2c How many days / months did you rent this property?		
2d How many days did you / your family occupy this property?		
2e Percentage of your / your family personal use.	%	%

Expenses	Property A				Property B			
	Total Amt. Expended	% Alloc.	Rental Amount	Leave Blank	Total Amt. Expended	% Alloc.	Rental Amount	Leave Blank
3a Merchant Card / 3rd Party Payments								
3b Rental Income								
4 Royalty Income								
5 Advertising								
6 Auto (58.0¢ per mile) & Travel								
7 Cleaning & Maintenance								
8 Commissions								
9 Insurance								
10 Legal & Accounting								
11 Management/Co-op/Condo Fees								
12 Mortgage Interest								
13 Other Interest								
14 Repairs (list):								
15 Supplies								
16 Taxes								
17 Utilities								
18 Equipt/Furniture & Improvements ❖								
19 Other (list):								
Income Transferred to Sheet #3								
20 Total Expenses								
21 Net								

Important Notes ♦ If you live in a building that includes a rental apartment, you must prorate the expenses that are shared by the two (or more) units.
 ❖ If you provided us with this information in prior years, it is not necessary to do so again. ❖ See other side of sheet. NO BACK
 CAPITALIZATION POLICY

4562 Rental Property Depreciation Statement

ENTER CURRENT YEAR'S COSTS FIRST. DO NOT ENTER PRIOR YEARS COSTS IF WE PREPARED YOUR LAST YEAR'S TAX RETURN.

Description 19.	PROPERTY		DATE ACQUIRED	TOTAL COST	LAND VALUE	RENTAL % USE	BASIS LEAVE BLANK	YEARS LEAVE BLANK	DEPREC LEAVE BLANK
	A	B							
Rental Property									
Rental Property									
Improvement:									
Improvement:									
Improvement:									

4562 Equipment and Furniture in or used for Rental Units

PART III ENTER CURRENT YEAR'S COSTS FIRST. DO NOT ENTER PRIOR YEARS COSTS IF WE PREPARED YOUR LAST YEAR'S TAX RETURN.

Description of Assets 19. each costing \$2,500 or more <input type="checkbox"/> You must adopt a capitalization policy	PROPERTY		DATE ACQUIRED	TOTAL COST	RENTAL % USE	LEAVE BLANK	YEARS	DEPRECIATION	
	A	B						LEAVE BLANK	CUMULATIVE

Did you sell any property previously deducted in this section? YES NO

IF YES, PLEASE PROVIDE CLOSING STATEMENTS OF THE BUY AND SALE OF THE SOLD PROPERTY

	Property A	Property B
Sale Date:		
Sale Amount:		