

Bowie & Co.

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Rental Income Worksheet

Rental Income — Schedule E

Use this worksheet for any property that generates rental income. This is an additional worksheet to the general Tax Return Interview Worksheet. If you've yet to complete that first one, please do so. You can find it at kjbowie.com/resources.php. Note: the IRS requires all reported information you state below to be backed-up by written, printed, or digital proof (i.e.: receipts, reports, or bills).

Note: Use a separate sheet for each property.

Legal Name (first, MI, last): _____

Property Street Address: _____

City: _____ State: _____ Zip code: _____

Business Name (if other than legal name): _____

EIN (if any): _____ - _____ Days avail. for rental: 365 days OR _____

Type of property (e.g.: Single family, apartment, etc.): _____

If you live in this property, as well: PERSONAL = _____% RENTAL = _____%

Purchased in 2016? yes: Total = \$ _____ Date of purchase = _____

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INCOME

Total rent received : \$ _____

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EXPENSES (LIST RENTAL EXPENSE PORTION - DO NOT INCLUDE PERSONAL PORTION)

Advertising: \$ _____

Association dues: \$ _____

Auto and/or travel: \$ _____

Bank service fees: \$ _____

Cleaning/maintenance: \$ _____

Dues & subscriptions: \$ _____

Insurance: \$ _____

Legal, accounting, professional fees: \$ _____

Licenses/permits: \$ _____

Management fees: \$ _____

Mortgage interest: \$ _____

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Other interest: \$ _____

Repairs: \$ _____

Supplies: \$ _____

Subcontractors: \$ _____

+ If you've paid any one person \geq \$600 in 2016, you are required to send them a 1099

Did you send any 1099s? yes no

Real Estate Taxes: \$ _____

Utilities: \$ _____

Small tools and equipment: \$ _____

Postage and delivery: \$ _____

Job Materials: \$ _____

Other (specify): _____ = \$ _____

Other (specify): _____ = \$ _____

Other (specify): _____ = \$ _____

Other (specify): _____ = \$ _____

Other (specify): _____ = \$ _____

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LARGE PURCHASES (ASSETS)

Any large purchase is one that is **greater than \$1,000 and has a life span beyond a single year.**
This includes, but not limited to, property, large renovations, repairs, and appliances.

Item	Date of Purchase	Cost
<input type="checkbox"/> _____	_____	\$ _____
<input type="checkbox"/> _____	_____	\$ _____
<input type="checkbox"/> _____	_____	\$ _____
<input type="checkbox"/> _____	_____	\$ _____
<input type="checkbox"/> _____	_____	\$ _____
<input type="checkbox"/> _____	_____	\$ _____

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NOTES / Here, have some more lines:

