



SDP Tax Services

Client Name: _____

FAX: (951) 479 - 9199

EMAIL: sdptaxsupport@pathwaywealthtax.com

1040**US****Rental & Royalty Income (Schedule E)**

Please enter all pertinent information and amounts.

GENERAL INFORMATION

Description of property.....

Street address.....

City.....

State.....

ZIP code.....

Type of property (see table)....

Other type of property.....

Number of days rented.....

Type of Property

- 1 = Single Family Residence
- 2 = Multi-Family Residence
- 3 = Vacation/Short-Term Rental
- 4 = Commercial
- 5 = Land
- 6 = Royalties
- 7 = Self-Rental

Percentage of ownership

if not 100% (.xxxx).....

Percentage of tenant occupancy

if not 100% (.xxxx).....

1=spouse, 2=joint.....

1=qualified joint venture.....

1=nonpassive activity,

2=passive royalty.....

1=did not actively participate. . .

1=RE prof., activity is trade or business,

2=RE prof., not trade or business

1=rental other than real estate .

1=investment

1=single member limited

liability company

INCOME**This Year's Amount**

Rents received.....

DIRECT EXPENSES

NOTE: Direct expenses are related only to the rental activity. These include rental agency fees, advertising, and office supplies.

Advertising.....

Association dues.....

Auto and travel (not entered elsewhere).....

Cleaning and maintenance.....

Commissions.....

Gardening.....

Insurance.....

Legal and professional fees.....

Licenses and permits.....

Management fees.....

Miscellaneous.....

Mortgage interest (paid to banks, etc.).....

Qualified mortgage insurance premiums.....

Excess mortgage interest.....

Other interest (not entered elsewhere).....

Painting and decorating.....

Pest control.....

Plumbing and electrical.....

Repairs.....

Supplies.....

Taxes - real estate.....

Taxes - other (not entered elsewhere).....

Telephone.....

Utilities.....

Wages and salaries.....

Other:
