2025

Schedule E - Rental Real Estate & Royalties

If this is your first year with us, please provide last year's tax return and confirm that it includes the depreciation schedule (usually in the back pages)

Name:

General Property Information

TSJ _____

Property description ______________________________

Address, city, state, ZIP ______________________________

Select the property type

- ☐ Single family residence
- ☐ Vacation / short-term rental
- ☐ Land
- ☐ Self-rental
- ☐ Multi-family residence
- ☐ Commercial
- ☐ Royalties
- ☐ Other ______________

Number of days property was rented ______________ Number of days property was used for personal use ______________

If the rental is a multi-dwelling unit and you occupied part of the unit, enter the percentage you occupied ______________

- ☐ This property was placed in service during 2025.
- ☐ This property was disposed of during 2025.
- ☐ This property is your main home or second home.
- ☐ This property was owned as a qualified joint venture.

Yes	No	
☐	☐	Payments of $600 or more were paid to an individual, who is not your employee, for services provided for this rental.
☐	☐	If "Yes," did you file Forms 1099 for the individuals?

Income

	2025		2025
Rent income	______________	Royalties from oil, gas, mineral, copyright or patent	______________

Expenses

	Rental Unit Expenses	Rental and Homeowner Expenses
Advertising	______________	
Auto & travel	______________	
Cleaning & maintenance	______________	______________
Commissions	______________	
Insurance	______________	______________
Legal & professional fees	______________	
Management fees	______________	
Mortgage interest	______________	______________
Other interest	______________	______________
Repairs	______________	______________
Supplies	______________	______________
Taxes	______________	______________
Utilities	______________	______________
Depletion	______________	
Other expenses		
______________	______________	______________
______________	______________	______________
______________	______________	______________
______________	______________	______________
______________	______________	______________
______________	______________	______________
______________	______________	______________
______________	______________	______________

If this Schedule E is for a a multi-unit dwelling and you lived in one unit and rented out the other units, use the "Rental and homeowner expenses" column to show expenses that apply to the entire property. Use the "Rental unit expenses" column to show expenses that pertain ONLY to the rental portion of the property.

If the Schedule E is not for a multi-unit property in which you lived in one unit, complete just the "Rental unit expenses" column.

Large Purchases & Improvements

Did you purchase or sell any assets or make any improvements with a project cost over $2,500?

If so, please list separately, along with date put in or taken out of service. Do not include these items with repairs, supplies or maintenence.