Grigsby Mosley Tax & Accounting Services
Mittie Grigsby, Oakland TEL: (510) 823-3767 / **Lionel Mosley,** San Jose TEL: (408) 274-8727
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Schedule E Worksheet for Rental Property

- IRS Requires us to have ***your information*** in hand to support all Schedule E's

Rental Property #___ – Address _____

Purchased Date ___/___/_____ Initial Cost $ _____ Improvements $ _____

Rental Property #___ – Address _____

Purchased Date ___/___/_____ Initial Cost $ _____ Improvements $ _____

Rental Property #___ – Address _____

Purchased Date ___/___/_____ Initial Cost $ _____ Improvements $ _____

Tax Year	**Rental#**	**Rental #**	**Rental #**
Rents Received	$	$	$
Advertising	$	$	$
Cleaning and Maintenance	$	$	$
Commissions	$	$	$
H O A Dues	$	$	$
Insurance	$	$	$
Legal/Professional Fees	$	$	$
Management Fees	$	$	$
Mortgage Interest Paid to Banks	$	$	$
Other Interest	$	$	$
Repairs	$	$	$
Supplies	$	$	$
Taxes	$	$	$
Utilities	$	$	$
Other_____	$	$	$
Other_____	$	$	$

- Business Mileage to and from Rentals _____mi _____mi _____mi

Question MUST be answered >> Do you have "evidence" to support your mileage? …… . . . . ☐ Yes ☐ No
and this if applicable >> If yes, is the "evidence" written? . ……. . . . . . ☐ Yes ☐ No

Car & Truck Expense (if vehicle purchased and used solely for rental property management)

- Year _____Make_____ Model_____ Purchase Price $_____ Date placed into business service _____
- Odometer reading Beginning of year _____. Odometer reading End of year _____.
- Business Mileage _____(Do not include mileage to and from home unless your office is in your home)

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Appliance / HVAC Purchases / Major Improvements

	Date	**Date**	**Date**
	$	$	$
	Date	**Date**	**Date**
	$	$	$
	Date	**Date**	**Date**
	$	$	$
	Date	**Date**	**Date**
	$	$	$
	Date	**Date**	**Date**
	$	$	$
	Date	**Date**	**Date**
	$	$	$
	Date	**Date**	**Date**
	$	$	$
	Date	**Date**	**Date**
	$	$	$

Office At Home

Do you have an Office in Your Home? ☐ Yes ☐ No

If Yes Sq Ft of Office _____ Sq Ft of Home _____

Real Estate Taxes $ _____ Mortgage Interest $ _____

HO Insurance $ _____ Utilities $ _____

Question MUST be answered >> Did you spend at least 250 hours on your rentals? . ... ☐ Yes ☐ No
and this if applicable >> If yes, can you prove it to IRS if requested? . ... ☐ Yes ☐ No

I certify that I have listed all income, all expenses, and I have documentation to prove the figures entered on this worksheet.

Printed Name _____Signature _____Date