

# TAX ATTENDANT

JAY H. KLEIN JR.

222 Woodland Ave. • Avon by the Sea, NJ 07717  
908-500-0105 • Taxattendant@me.com

## RENTAL

### SCHEDULE E - SUPPLEMENTAL INCOME & LOSS

#### YOUR INFORMATION

Name (First, Middle, Last) \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

#### PROPERTY RENTALS

*Need for depreciation schedules*

Purchase Price \_\_\_\_\_ Cost of Just the Land \_\_\_\_\_ Date Purchased \_\_\_\_\_ Date Start As Rental \_\_\_\_\_

#### TYPE OF PROPERTY

*Description & type of use*

Single Family \_\_\_\_\_ Multi-Family \_\_\_\_\_ Vacation/Short-Term \_\_\_\_\_ Commercial \_\_\_\_\_ Land \_\_\_\_\_

Number of Days Rented \_\_\_\_\_ Number of Personal Use Days \_\_\_\_\_ Ownership % \_\_\_\_\_

Full Address \_\_\_\_\_

#### RENTS RECEIVED

*Send 1099 Misc*

Total Rent \_\_\_\_\_ 1099 Misc Name \_\_\_\_\_ EIN Number \_\_\_\_\_

#### EXPENSES

*Keep track of every year*

Advertising \_\_\_\_\_ Auto Travel Miles \_\_\_\_\_ Cleaning & Maintenance \_\_\_\_\_ Commissions \_\_\_\_\_

Insurance \_\_\_\_\_ Legal & Pro. Fees \_\_\_\_\_ Management Fees \_\_\_\_\_ Mortgage Interest \_\_\_\_\_

Repairs \_\_\_\_\_ Supplies \_\_\_\_\_ Taxes \_\_\_\_\_ Utilities \_\_\_\_\_

Other (list) (Bad debt, collections, credit checks, equipment rental, meals, postage, pest, lawn, dumpster, etc.)

#### IMPROVEMENTS

*Add value, add new use (while repairs maintain)*

Type \_\_\_\_\_ Date \_\_\_\_\_ Cost \_\_\_\_\_

Type \_\_\_\_\_ Date \_\_\_\_\_ Cost \_\_\_\_\_

Type \_\_\_\_\_ Date \_\_\_\_\_ Cost \_\_\_\_\_

#### FINAL QUESTIONS

*Please make sure you answer*

Did you make any payments that would require you to file Form 1099? \_\_\_\_\_

Did you file them? \_\_\_\_\_

Did you actively participate in the management of this property? \_\_\_\_\_

Do you have written evidence of your vehicle business miles? \_\_\_\_\_

Total Personal Miles Driven? \_\_\_\_\_