

SUSSMAN & ADDIS

CERTIFIED PUBLIC ACCOUNTANTS

Client Name: _____

Rental Income Worksheet- Year 2023

Please complete this worksheet showing Income and Expenses on each rental property you own.

(IRS Requires us to have your information in hand to support all Schedule E's)

Property	Address	Type of Rental (circle one)	# of Days (Personal Use vs. Rented)	
			Personal	Rented
1		Commercial	Personal	
		Residential-Single		
		Residential- Multi	Rented	
		Vacation		
2		Commercial	Personal	
		Residential-Single		
		Residential- Multi	Rented	
		Vacation		
3		Commercial	Personal	
		Residential-Single		
		Residential- Multi	Rented	
		Vacation		

<i>(Estimates are not acceptable)</i>	Property 1	Property 2	Property 3
Income			
Rent			
Security Deposits Received			
Other:			
Expenses			
Advertising			
Auto Expenses (If any, complete section A)			
Cleaning/Maintenance			
Commissions			
Insurance			
Legal & Professional Fees			
Management Fees			
Mortgage Interest (Attach 1098 form)			
Repairs			
Supplies			
Real Estate Tax			
Utilities			
Association Fees			
Miscellaneous/Postage/Office supplies			
Travel (Plane, Bus, Taxi)			
Lodging while away from home			
Meals while away from home overnight			
Number of days out overnight			
Security Deposit Returned			

Other:			

Section A: Mileage

Business Mileage for Rentals **Property 1** **Property 2** **Property 3**
 _____ mi _____ mi _____ mi

Do you have "evidence" to support your mileage?	Yes	No
If yes, is the "evidence" written?	Yes	No
"Evidence" includes mileage logs, appointment records, calendars, etc. plus IRS could ask for odometer readings from oil changes, repair invoices, purchase and sale documents.		

Section B: Furnishing, Appliances, & Major Improvements

Property Number	Date	Description	Cost

Section C: Notes

All information for which I have receipts, cancelled checks, or other written evidence, is true and correct as furnished by the undersigned Sussman & Associates, Inc for the preparation of Schedule E for the year ended December 31, 2023. I understand that Sussman & Associates, Inc. will not audit or verify the data submitted, although they may ask me to clarify it. I will contact you immediately, if I discover additional information that will lead to a change in my return, or if I receive any letters from the IRS or state taxing authorities.

Signature: _____ Date: _____
 Signature: _____ Date: _____