

Schedule E - Rental Real Estate & Royalties Worksheet

Name:

SSN:

GENERAL PROPERTY INFORMATION

Property description

Property address

☐ Single-family residence

☐ Multi-family residence

☐ Vacation / short-term rental

☐ Commercial

☐ Land

☐ Royalties

☐ Self-rental

☐ Other

Date acquired

Date placed in service

Purchase price

Days rented

Personal-use days

Owner-occupied % (multi-unit)

TSJ

☐ Placed in service during 2026

☐ Disposed of during 2026

☐ Main or second home

☐ Owned as a qualified joint venture

☐ Paid \$600+ to nonemployee for rental services

☐ If applicable, Forms 1099 filed

Major improvements / appliances / equipment purchased in 2026?

☐ Yes

☐ No

Attach invoices / details.

2026 INCOME

Gross rents received

Royalties (oil, gas, mineral, copyright, pa

Security deposits retained as income

Other rental income

2026 EXPENSES

Expense category	Rental Unit	Rental & Homeowner	Notes
Advertising			
Auto & travel			
Cleaning & maintenance			
Commissions			
Insurance			
Legal & professional fees			
Management fees			
Mortgage interest (attach Form 1098)			
Other interest			
Repairs			
Supplies			
Taxes			
Utilities			
Depletion			
Other expenses			
Other - description			
Other - description			

IMPROVEMENTS / NEW ASSETS DURING 2026

Description	Date	Cost	Business-use %	New/Used

Please upload/bring: Form 1098, property-tax statement, closing statement for any purchase/sale, and invoices for improvements or major equipment.

Multi-unit property: Use Rental & Homeowner for whole-property costs; use Rental Unit for costs that apply only to the rental portion.