Schedule E - Income or	Loss from F	Rental Real Estate &	Royalties
Name:			SSN:
General Property Information			
TSJ Property description			
Address, city, state, ZIP			
Select the property type Single family residence Multi-family residence Commercial Number of days property was rented If the rental is a multi-dwelling unit and you occupied part of This property was placed in service during 2024. This property was disposed of during 2024.	Number of days p	No Payments of \$600 or mo	Self-rental Other use ore were paid to an individual, who is services provided for this rental.
This property is your main home or second home. This property was owned as a qualified joint venture.			Forms 1099 for the individuals?
Income			
	2024		2024
Rent income		Royalties from oil, gas, mineral, copyright or patent	
Expenses			
	Rental Unit Expenses	Rental <u>and</u> Homeowner Expenses	
Advertising			If this Schedule E is for a
Auto & travel			a multi-unit dwelling and you lived in one unit and rented
Cleaning & maintenance			out the other units, use the
Commissions			"Rental and homeowner
Insurance			expenses" column to show expenses that apply to the entire
Legal & professional fees		H	property. Use the "Rental unit
Management fees			expenses" column to show expenses that pertain ONLY to
Mortgage interest			the rental portion of the property.
Other interest			If the Schedule E is not for a
		S(multi-unit property in which you
Repairs			lived in one unit, complete just
Supplies		-	the "Rental unit expenses" column.
Taxes		//	
Utilities			
Depletion			
		8	
		()	

CLIENT REPRESENTATION: VEHICLE INFORMATION FOR TAX YEAR 2024

	Vehicle 1	Vehicle 2	Vehicle 3
Year of Vehicle	1		3
Make and Model			
Name of Driver			
Disclosure Requirements:	-		
Date Vehicle placed in service for business use			
2. End of Year Odometer Reading			
3. Beginning of Year Odometer Reading			
4. Total Miles driven during entire year for all purposes			
5. Business miles driven in 2024			
6. Total Commuting miles driven in 2024			
7. Total other personal (not commuting) miles driven during the year			
8. Total miles driven during the year - Please add lines 5 to 7 (This should equal line 4)			
Average daily round trip commute (home to work and back)			
Substantiation Requirements:	Yes/No	Yes/No	Yes/No
. Was the vehicle available for personal use during off duty hours?			
2. Is another vehicle available for personal use?			
3. Was the vehicle used primarily by an owner/partner/shareholder?			
Do adequate records of sufficient evidence exist to justify the business miles being claimed?			
5. Is the evidence of these miles written?			
5. Is this vehicle leased?			
7. Have you deducted expenses in the past for this vehicle?			
3. Did you buy, sell or trade this vehicle in 2024? If yes,			
provide documentation and details			

To determine if actual expenses are greater than standard mileage, complete this table:

ACTUAL VEHICLE EXPENSES:	Vehicle 1	Vehicle 2	Vehicle 3
Cost of vehicle when purchased		-	
Date vehicle was originally purchased			
Gas/Fuel			
Insurance			
Repairs			
Licenses & Registrations			
Lease Cost			
Interest			
Tires			
Tolls & Parking fees			
Oil			
Other			

IN HOME OFFICE DEDUCTION:

Yes/No Do you operate a business out of your home?

If no, stop here.

Yes/No Do you have an area you use regularly and exclusively for business purposes?

If no, stop here.

Yes/No Do you want to claim an in-home office deduction if you meet the requirements?

If no, you can skip the remaining questions.

Square footage of entire home	
Square footage of area used regularly & exclusively for the business	
Do you want to claim the standard allowance for the in-home office	
deduction or actual expense? (If actual complete info below)	Standard /Actual
Expenses:	
Mortgage Interest	\$
Property taxes	\$
Homeowner's insurance	\$
Rent	\$
Repairs & maintenance	\$
Utilities	\$
Heat	\$
Garbage Collection fees	\$
Other	

CLIENT REPRESENTATION WITH REGARD TO TRAVEL, ENTERTAINMENT AND GIFTS FOR THE TAX YEAR 2024

NAME OF TAXPAYER/BUSINESS:
In accordance with Treasury Department Regulations governing preparers of tax returns, I am requesting each client to sign the following in any case where a deduction for auto, travel, meals, and/or gifts is being claimed on a tax return I am preparing:
I state that I have maintained adequate records and/or sufficient evidence corroborating my deduction for travel, meals, and/or gifts. Specifically, my records substantiate (a) the amount of such expense or other item; (b) the time and place of travel, or the date and description of the gift; (c) the business purpose of the expense or other item; and (d) the business relationship to me of persons fed or receiving the gift.
I understand fully that you are not in any way undertaking to audit and/or verify the facts as I submitted them to you. Upon request of the taxing authorities, I will furnish any necessary substantiation to support the numbers I have provided to you for this tax return.
I am aware that entertainment expenses are no longer a deduction and have segregated them from other deductible items.
Signature: Date:
Title: