For your protection, submit information to your tax professional only through secure means.

Rental and Royalty Income

Location of Property: **T/S/J:**

Type of Property:

Rental and Royalty Questions for 2021		Yes	No
Have you prepared or will you prepare all required Forms 1099?		☐	☐
Did you dispose of this rental?		☐	☐
If Yes, what was the disposal date:			
Did you receive any government assistance programs such as PPP, employment credits, EIDL? If so, please provide detail below:		☐	☐

Please provide details on significant changes to your rent or royalty business during the tax year:

	2020 Amount	2021 Amount
Ownership percentage, if not 100%		
How many days was this property rented at fair market value?		
How many days was this property used personally (including use by family members)?		

Income ***(Include all Forms 1099-MISC)***	2020 Amount	2021 Amount
Rents received		
Royalties received		

Rental and Royalty Expenses

Location of Property:

General Expenses	2020 Amount	2021 Amount
Advertising		
Auto and travel		
Cleaning and maintenance		
Commissions		
Insurance (other than health)		
Legal and other professional fees		
Management fees		
Mortgage interest paid to financial institutions		
Mortgage interest paid to individuals		
Other interest		
Repairs		
Supplies		
Taxes		
Utilities		
Dependent care benefits		
Employee benefits		

Other Expenses	2020 Amount	2021 Amount

Rental and Royalty Property & Equipment

Location of Property:

Acquisitions

X if not new	Acquisitions – Description	Date Acquired	Cost
☐			
☐			
☐			
☐			
☐			
☐			

Disposals

Note: Asset listing may follow, which can alternatively be used to note disposed items.

Dispositions – Description	Date Acquired	Cost	Date Sold	Selling Price

Rental and Royalty Fixed Asset Listing

Location of Property:

Description	Original Date in Service	Original Cost	Date Sold	Selling Price	Check if Disposed
					☐
					☐
					☐
					☐
					☐
					☐

Rental and Royalty Vehicle and Other Listed Property

Location of Property:

Vehicle Information

Description of Vehicle:

Date placed in Service:

	Yes	No
Do you have evidence to support your deduction?	☐	☐
If yes, is the evidence written?	☐	☐
Do you have evidence to support the business use claimed on the listed property?	☐	☐
If yes, is the evidence written?	☐	☐
Do you (or your spouse) have another vehicle available or personal use?	☐	☐
Was your vehicle available for use during off-duty hours?	☐	☐

Mileage	2020 Miles	2021 Miles
Total miles (personal + business)		
Total business miles		
Total commuting miles for the year		

Actual Expenses	2020 Amount	2021 Amount
Gasoline, oil, repairs Insurance, etc.		
Interest		
Taxes		
Vehicle rentals/leases		