



# Mennenga

TAX & FINANCIAL

Now a Part of Merit Tax Advisors

# Rental Organizer (Schedule E)

814 Atlas Avenue • Madison WI 53714 • 608.241.5678

<b>Rental Property</b>	Provide the EIN(s) for each LLC or property
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Property Information	1	2	3	4
Property Type				
Street Address				
City, State, Zip				
EIN (Entity Identification Number)				
2025 Date Bought/ Sold? (include Settlement Statement)				

Revenue & Usage	1	2	3	4
Rental income	\$	\$	\$	\$
Dates of Rental use (if not Year-Round)				
Number of Personal days use				
Insurance reimbursements	\$	\$	\$	\$
Hours Managed?	Hours	Hours	Hours	Hours
Time Documented?	Yes / No	Yes / No	Yes / No	Yes / No

Related Expenses	Amount	Amount	Amount	Amount
Advertising*	\$	\$	\$	\$
Cleaning & Maintenance*	\$	\$	\$	\$
Commissions*	\$	\$	\$	\$
Insurance	\$	\$	\$	\$
Legal & Professional Fees*	\$	\$	\$	\$
Management & Condo Fees	\$	\$	\$	\$
Mortgage Interest (Provide Form 1098)	\$	\$	\$	\$
Other Interest	\$	\$	\$	\$
Repairs* (What qualifies? Ask us)	\$	\$	\$	\$
Supplies	\$	\$	\$	\$
Property Taxes	\$	\$	\$	\$
Phone (rental percentage only)	\$	\$	\$	\$
Internet (rental percentage only)	\$	\$	\$	\$
Utilities Heat & Electric	\$	\$	\$	\$
Water & Sewer	\$	\$	\$	\$
Trash	\$	\$	\$	\$
Lawn Care & Snow Removal*	\$	\$	\$	\$
Other Expense	\$	\$	\$	\$

**Purchase equipment, refinance, make improvements or replacements for the property, sell equipment, or dispose of equipment?**  
*Examples: New roof, driveway, windows, etc. Provide all necessary paperwork: Closing statement & purchase paperwork (receipts)*

Property Number	Date of Purchase/ Sale/ Improvement	Dollar Amount	Description	Trade in?
				Yes / No
				Yes / No

MILEAGE	Vehicle Make/ Model	Date in Service	Business Miles	Total Miles	Loan Interest	Written Log
Vehicle 1						Yes / No
Vehicle 2						Yes / No

**QBI—Safe Harbor for Real Estate Activities** require separate books and records maintained for each rental activity, 250 or more hours of services for each property each year, and to document service hours (date, who did it, what was done, how long it took).

Pay anyone \$600 or more for services? (If yes, contact your advisor IMMEDIATELY)  
 \* **Related Expenses** above marked with an \* may require you to issue a 1099-NEC.

Client Initials \_\_\_\_\_