



Taxpayer & Spouse: _____

RENTAL INCOME INFORMATION- MODULE 9A

Please provide the information requested below. Please circle the applicable response where available in this document. If the question does not pertain to you please mark N/A. Unless indicated, all questions pertain to the _____ tax year. Please use separate sheets if more space is needed.

1. Did you or your spouse receive proceeds from rental property during the tax year? yes/no/na

Property Type (i.e. residential, commercial, etc.) and Property Owner	Property Address and Tenant	Rental Amount Received

2. Real Estate Professional & At-Risk Investment

- a. Were more than half of the personal services that you (only you and not combined with your spouse) performed during the year performed in a real property trade or business? yes/no/na
- b. Were more than half of the personal services that your spouse (only your spouse and not combined with you) performed during the year performed in a real property trade or business? yes/no/na
- c. Did you (only you and not combined with your spouse) perform more than 750 hours of services during the year in a rental property trade or business? yes/no/na
- d. Did your spouse (only your spouse and not combined with you) perform more than 750 hours of services during the year in a rental property trade or business? yes/no/na

3. Do either of the following apply to you? Indicate which applies, if any.

- a. You participated (work on behalf of the business) in the business for less than 500 hours during the tax year. yes/no/na

- b. You participated in the business less than any other person involved in the business during the tax year. yes/no/na
4. Do either of the following apply to your spouse? Indicate which applies, if any.
- a. Your spouse participated (work on behalf of the business) in the business for less than 500 hours during the tax year. yes/no/na
 - b. Your spouse participated in the business less than any other person involved in the business during the tax year. yes/no/na

Please provide responses to each of the following questions for each of the real estate properties discussed in the above table.

Property address:

- 1. Was the property used for personal use? yes/no/na
 - a. If yes, how many days was the property used by you, a member of your family, or any individual not paying fair market value rent?
 - b. If yes, how many days was the property unoccupied?
 - i. If the property was unoccupied, was it available for rental during the time it was unoccupied? yes/no/na
 - c. How many days was the property rented during the year?
- 2. What is your relationship with the tenant?
- 3. When was the property first put into service?
- 4. Did you incur and pay any of the following expenses relating to the subject property? Please indicate how much you spent next to each category.
 - a. Advertising; \$_____ yes/no/na
 - b. Commissions; \$_____ yes/no/na
 - c. Cleaning and maintenance (including ordinary and necessary expenses for managing, conserving, or maintaining the property if the property is vacant and during the property's pre-rental stage); \$_____ yes/no/na
 - d. Insurance; \$_____ yes/no/na
 - e. Legal and professional fees; \$_____ yes/no/na

- f. Management (including ordinary and necessary expenses for managing, conserving, or maintaining the property if the property is vacant and during the property's pre-rental stage); \$_____ yes/no/na
- g. Mortgage interest (provide associated Form 1098-INT); \$_____ yes/no/na
- h. Interest; \$_____ yes/no/na
- i. If you refinanced the property, did you use any proceeds for a purpose not related to the rental use of the property? yes/no/na
- A. If yes, explain.
- i. Repairs; \$_____ yes/no/na
- j. Supplies; \$_____ yes/no/na
- k. Taxes; \$_____ yes/no/na
- l. Utilities; and \$_____ yes/no/na
- m. Other expenses (list out). \$_____ yes/no/na
5. Did you use a personal vehicle for purposes of traveling with respect to your rental activities? yes/no/na
- a. How many miles did you drive with respect to your rental activities? Deductible miles are only those miles that are attributable to driving with respect to your rental activities. Miles attributable to personal use of the vehicle are considered non-deductible commuting expenses. DO NOT include miles driven for personal use.
- i. Do you have a log discussing the location visited, the date visited, and purpose? Is the log written? yes/no/na
6. If this is the first year we are preparing your return, provide depreciation records. yes/no/na
7. Was the property purchased or sold during the year? yes/no/na
- a. If yes, provide Form 1099-S (if applicable), a description of the property purchased and/or sold, the purchase and/or sale price, the closing statement, the date the property was sold and/or purchased, the price that you paid when you originally purchased the property if the property was sold, and the date you originally purchased the property if the property was sold.

CERTIFICATION

The undersigned certifies, under the penalties of perjury, that the information provided in response to the foregoing questions is complete and accurate to the best of his or her knowledge. The undersigned further certifies that he or she has provided the information requested herein. The undersigned also certifies that he or she has verified the information provided in this document and states that it comports with the supporting documentation provided, if any.

Taxpayer's Signature

Spouse's Signature

Taxpayer's Printed Name

Spouse's Printed Name

Dated:

Dated: