





# Rent and Royalty Property - General Information

**1**

Preparer use only

2009 Information

Prior Year Information

Taxpayer/Spouse/Joint (T, S, J) **T**[2]

Description: \_\_\_\_\_ [3]

\_\_\_\_\_ [4]

\_\_\_\_\_ [5]

State postal code \_\_\_\_\_ [6]

Type of activity (1 = Rental real estate, 2 = Substantially nondepreciable property, 3 = Royalty) \_\_\_\_\_ [7]

Percentage of ownership if not 100% \_\_\_\_\_ [9]

Business use percentage, if not 100% (Not vacation home percentage) \_\_\_\_\_ [11]

## Rent and Royalty Income

2009 Information

Prior Year Information

Gross rents received + \_\_\_\_\_ [18]

Gross royalties received + \_\_\_\_\_ [20]

## Rent and Royalty Expenses

2009 Information

Percent if not 100%

Prior Year Information

Advertising + \_\_\_\_\_ [22] \_\_\_\_\_ [23]

Auto + \_\_\_\_\_ [25] \_\_\_\_\_ [26]

Travel + \_\_\_\_\_ [28] \_\_\_\_\_ [29]

Cleaning and maintenance + \_\_\_\_\_ [31] \_\_\_\_\_ [32]

Commissions: + \_\_\_\_\_ [34] \_\_\_\_\_ [36]

\_\_\_\_\_ + \_\_\_\_\_

Insurance: + \_\_\_\_\_ [37] \_\_\_\_\_ [39]

\_\_\_\_\_ + \_\_\_\_\_

Legal and professional fees + \_\_\_\_\_ [40] \_\_\_\_\_ [41]

Management fees + \_\_\_\_\_ [43] \_\_\_\_\_ [45]

\_\_\_\_\_ + \_\_\_\_\_

Mortgage interest paid to banks, etc (Form 1098) + \_\_\_\_\_ [46] \_\_\_\_\_ [47]

Other mortgage interest + \_\_\_\_\_ [49] \_\_\_\_\_ [50]

Qualified mortgage insurance premiums + \_\_\_\_\_ [52] \_\_\_\_\_ [53]

Other interest: + \_\_\_\_\_ [55] \_\_\_\_\_ [57]

\_\_\_\_\_ + \_\_\_\_\_

Repairs + \_\_\_\_\_ [58] \_\_\_\_\_ [59]

Supplies + \_\_\_\_\_ [61] \_\_\_\_\_ [62]

Taxes: + \_\_\_\_\_ [64] \_\_\_\_\_ [66]

\_\_\_\_\_ + \_\_\_\_\_

Utilities + \_\_\_\_\_ [67] \_\_\_\_\_ [68]

Depreciation + \_\_\_\_\_ [70] \_\_\_\_\_ [71]

Depletion + \_\_\_\_\_ [73] \_\_\_\_\_ [74]

Other expenses: + \_\_\_\_\_ [79] \_\_\_\_\_

\_\_\_\_\_ + \_\_\_\_\_

\_\_\_\_\_ + \_\_\_\_\_

\_\_\_\_\_ + \_\_\_\_\_

\_\_\_\_\_ + \_\_\_\_\_

\_\_\_\_\_ + \_\_\_\_\_

Refinancing points paid this year: Description \_\_\_\_\_ [81]

Total points paid/Current amort (Prep use only) \_\_\_\_\_ + \_\_\_\_\_

Date of Refinance \_\_\_\_\_ Total # Payments \_\_\_\_\_ Reported on 1098 in 2009

Control Totals +

**RENTAL**

Form ID: Rent





	Taxpayer	Spouse
Are you or your spouse (if MFJ or MFS) covered by an employer's retirement plan? (Y, N)	<u>Y</u> [1]	__[2]
Do you want to contribute the maximum allowable traditional IRA contribution amount? If yes, enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)	__[3]	__[4]
Enter the total traditional IRA contributions made for use in 2009	+ _____[5]	+ _____[6]

	Taxpayer	Spouse
Enter the nondeductible contribution amount made for use in 2009	+ _____[9]	+ _____[10]
Enter the nondeductible contribution amount made in 2010 for use in 2009	+ _____[11]	+ _____[12]
Traditional IRA basis	+ _____[13]	+ _____[14]
Value of all your traditional IRA's on December 31, 2009:	+ _____[15]	+ _____[16]
_____	+	_____
_____	+	_____
_____	+	_____
_____	+	_____
_____	+	_____

<b>Roth IRA</b>
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**Please provide copies of any 1998 through 2008 Form 8606 not prepared by this office**

	Taxpayer	Spouse
Mark if you want to contribute the maximum Roth IRA contribution	__[25]	__[26]
Enter the total Roth IRA contributions made for use in 2009	+ _____[27]	+ _____[28]
Enter the total amount of Roth IRA conversion recharacterizations for 2009	+ _____[33]	+ _____[34]
Enter the total contribution Roth IRA basis on December 31, 2008	+ _____[37]	+ _____[38]
Enter the total Roth IRA contribution recharacterizations for 2009	+ _____[39]	+ _____[40]
Enter the Roth conversion IRA basis on December 31, 2008	+ _____[41]	+ _____[42]
Value of all your Roth IRA's on December 31, 2009:	+ _____[43]	+ _____[44]
_____	+	_____
_____	+	_____
_____	+	_____
_____	+	_____
_____	+	_____

**NOTES/QUESTIONS:**

## Student Loan Interest Paid

Complete this section if you paid interest on a qualified student loan in 2009 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan.

	Qualified loan interest you paid <sup>[1]</sup>		2009 Information	Prior Year Information
TS	_____	+	_____	
—	_____	+	_____	
—	_____	+	_____	
—	_____	+	_____	

## Education Credits and Tuition and Fees Deduction

Complete this form if you paid qualified education expenses for higher education costs in 2009.

Qualified education expenses include tuition and fees required for enrollment or attendance at an eligible educational institution. Please provide all copies of Form 1098-T.

	Ed Exp Code*	Student's SSN <sup>[6]</sup>	Student's First Name	Student's Last Name	Qualified Expenses	Prior Year Information
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	
—	—	_____	_____	_____	+	

**Important:** You cannot claim the following for the same student in the same year:

- Hope credit and Lifetime learning credit
- Tuition and fees deduction and either the Hope credit or the Lifetime learning credit

To qualify for the Hope credit, the student must:

- be enrolled at least half-time
- be in a program leading to degree, certificate, or recognized credential
- not have completed first 4 years of post-secondary education
- have no drug convictions in 2009

<b>*Education Expense Code</b>
1 = Hope credit
2 = Lifetime learning credit
3 = Tuition and fees deduction

**NOTES/QUESTIONS:**

If you used your automobile for business purposes, please complete the following information.

C 1 Preparer use only

Description of business or profession SCHEDULE C, PART 2 [3]

Vehicles 1 - 2

Vehicle 1 - Date placed in service 01/01/09 [5]
Description VEHICLE [6]
Comments
Vehicle 2 - Date placed in service [41]
Description [42]
Comments

Table with 5 columns: Item, Vehicle 1, Prior Year Information, Vehicle 2, Prior Year Information. Rows include Total miles for the year, Commuting miles, Business miles, and various vehicle use questions and expenses.

Vehicles 3 - 4

Vehicle 3 - Date placed in service [77]
Description [78]
Comments
Vehicle 4 - Date placed in service [113]
Description [114]
Comments

Table with 5 columns: Item, Vehicle 3, Prior Year Information, Vehicle 4, Prior Year Information. Rows include Total miles for the year, Commuting miles, Business miles, and various vehicle use questions and expenses.