

# Vacation Home and Other Rental with Personal Use

<b>Ownership</b>	1
Indicate: <b>T</b> = Taxpayer, <b>S</b> = Spouse, <b>J</b> = Joint . . . . . _____	
<b>Activity Information</b>	2
Kind of property (Mandatory) (House, Timeshare, etc.) _____	
Location of Property (Including Country) . . . . . _____	3
<b>Activity Type</b>	4
Indicate <b>V</b> if vacation home or <b>P</b> if other personal/business property . . . . . _____	
<b>Other Rental</b>	5
Indicate: Total area _____ Area used exclusively for business . . . . . _____	
<b>Vacation Home</b>	6
Indicate the total number of days in 2019: Rented at fair market value _____ Occupied by you or a relative _____	
If property is a timeshare, indicate total number of days available to you . . . . . _____	7
<b>Passive Activity - Vacation Home or Other Personal/Business Property Information</b>	8
Indicate <b>X</b> if you <b>actively</b> participated in the operation of the activity during 2019* . . . . . _____	
Indicate <b>X</b> if you disposed of the property in 2019 . . . . . _____	9
*Note: <b>Active participation</b> is defined as a taxpayer who must participate in a significant and bona fide sense, such as making management decisions.	
Organizer   Income   Rent and Royalty   Property Name   Rent and Royalty Information _____	

<b>Rental Income</b>	2019 amount	PY amount	
Income . . . . . _____			10

<b>Rental Expenses</b>	2019	2019	PY amounts	
Please attach an explanation if expenses include amounts incurred when the property was rented.	*Direct amount	*Indirect amount		
Mortgage interest paid to financial institutions . . . . . <i>(Attach detail - Do not duplicate elsewhere)</i>	N/A			11
Real estate taxes . . . . .	N/A			12
Casualty loss after insurance reimbursement . . . . .				13
Advertising . . . . .				14
Auto and travel . . . . .				15
Cleaning and maintenance . . . . .				16
Commissions . . . . .		N/A		17
Insurance . . . . .				18
Legal and other professional fees . . . . .				19
Management fees . . . . .				20
Repairs . . . . .				21
Supplies . . . . .				22
Utilities . . . . .				23
Other expenses				24
_____				25
_____				26
_____				27
_____				28
_____				29
Total expenses (Lines 11-29) _____				T

\***Direct expenses** benefit only the business part of the property. **Indirect expenses** benefit both the business and personal parts of the property.

Organizer | Income | Rent and Royalty | Property Name | Rent and Royalty Information | Inc and Exp With Personal Use \_\_\_\_\_

# Office-in-Home, Vacation Home and Other Rental with Personal Use

Property name: \_\_\_\_\_

## Depreciation and Amortization

Enter all property and equipment used in your home office, vacation home, or any other rental/personal business property. If you sold, traded, or otherwise disposed of an asset, please provide the date sold and gross sales price.

Description of property	Date placed in service MM DD YYYY	Cost or unadjusted basis	Business use %	Date sold MM DD YYYY	Gross sales price	
_____	_____	_____	_____	_____	_____	1
_____	_____	_____	_____	_____	_____	2
_____	_____	_____	_____	_____	_____	3
_____	_____	_____	_____	_____	_____	4
_____	_____	_____	_____	_____	_____	5
_____	_____	_____	_____	_____	_____	6
_____	_____	_____	_____	_____	_____	7
_____	_____	_____	_____	_____	_____	8
Total (Lines 1-8) _____					_____	T

**New Clients: For assets placed in service prior to 1/1/2019, please provide a schedule of accumulated depreciation on a per asset basis.**

If you had any amortization expenses (organizational costs, loan fees, etc.), for this property, provide details (description, date purchased, cost, life, etc.) below:

_____	9
_____	10
_____	11
_____	12

Organizer | Income | Business Income | *Business Name* | Depreciation and Amortization | Asset Detail

Note: If these are Office-in-Home assets tied to another entity, follow the navigation cues for that entity.

Notes: