

Military and/or Rental Worksheet

Tax Year _____

Military Worksheet

Check the statements that apply to you.

- I had **unreimbursed** training expenses.
 I had moving expenses.
 I sold my home.

Value of Non-Cash Charitable Contributions \$ _____

Unreimbursed travel expenses for military training

Distance travelled from home..... _____
 Date vehicle placed in service..... _____
 Total miles driven _____
 Total travel mileage _____
 Daily round trip to work..... _____
 Total commuting miles..... _____
 Lodging..... \$ _____
 Meals..... \$ _____

Moving expenses

Was your move a PCS? _____
 Miles from old home to new
 workplace..... _____
 Miles from old home to old
 workplace..... _____
 Cost of moving household goods..... \$ _____
 Miles from old home to new home _____
 Lodging expense..... \$ _____
 Amount of reimbursement
 (W2 box 12 code P)..... \$ _____

Sale of my home

Date of purchase..... _____
 Date of sale..... _____
 Purchase price..... \$ _____
 Cost of improvements..... \$ _____
 Sales price..... \$ _____

****For tax years 2017 and prior only****

Unreimbursed job-related business expenses

Cost and upkeep of uniforms you
 cannot wear off-duty..... \$ _____
 Travel..... \$ _____
 Professional dues..... \$ _____
 Cost of education to improve skills in
 current job..... \$ _____
 Other (specify _____) \$ _____

Rental Worksheet

Check the statements that apply to you.

- I sold my rental property.
*(Please stop here and take your documents to
 the intake desk for review.)*
 This is the first year my property was rented.

Rental income

It is important that you provide a copy of your prior year tax return; please include ALL pages.

Address of property rented:

Rent received..... \$ _____
 No. of days rented..... _____
 No. of days of personal use..... _____
 Date you started renting property..... _____
 Cost of property..... \$ _____
 Value of land..... \$ _____
 Cost of improvements..... \$ _____
 Adjusted basis..... \$ _____
 Previous depreciation..... \$ _____

Rental Expenses

Number of business miles _____
 Make/model of vehicle..... _____
 Date placed in service..... _____
 Advertising..... \$ _____
 Cleaning and Maintenance..... \$ _____
 Insurance..... \$ _____
 Management fees..... \$ _____
 Mortgage interest..... \$ _____
 Repairs..... \$ _____
 Supplies..... \$ _____
 Taxes..... \$ _____
 Utilities..... \$ _____
 Depreciation..... \$ _____
 Other..... \$ _____