

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 traveled from home in miles _____

Year/Make/Model of Vehicle: _____

Date vehicle placed in service (mm/dd/yyyy) _____

Total miles driven _____

Total travel mileage _____

Daily round trip to work _____

Total commuting miles _____

Lodging \$ _____

Meals \$ _____

Moving Expenses

Was your move a PCS? YES NO

Miles from old home to new workplace _____

Miles from old home to old workplace _____

Miles from old home to new home _____

Cost of moving household goods \$ _____

Lodging expense \$ _____

Amount of reimbursement (W2 Box 12 Code) \$ _____

Sale of Personal Home

Date of purchase (mm/dd/yyyy) _____

Date of sale (mm/dd/yyyy) _____

Purchase price \$ _____

Cost of improvements \$ _____

Sale price \$ _____

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

Unreimbursed Job-Related Business Expenses

Cost/upkeep of uniforms not worn 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. (Stop here and take your documents to your Intake specialist for review.)
- This is the first year my property was rented.

Unless this is the first year you rented your property, you MUST provide a copy of your prior year tax return, including all pages.

Rental Income

Address of property rented (required):

Total rent received \$ _____

No. of days rented _____

No. of days for personal use _____

Date you began renting property (mm/dd/yyyy) _____

Cost of property \$ _____

Value of land \$ _____

Cost of improvements \$ _____

Adjusted basis \$ _____

Previous depreciation \$ _____

Rental Expenses

Number of business miles:

1/1 – 6/30/22 _____

7/1 – 12/31/22 _____ Total miles: _____

Year/Make/Model of Vehicle _____

Date vehicle placed in service (mm/dd/yyyy) _____

Advertising \$ _____

Cleaning and maintenance \$ _____

Insurance \$ _____

Management fees \$ _____

Mortgage interest \$ _____

Repairs \$ _____

Supplies \$ _____

Taxes \$ _____

Utilities \$ _____

Depreciation \$ _____

Other(specify: _____) \$ _____