

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: _____
For tax year 2022 only, specify total miles for each period:
1/1 – 6/30/22 _____ 7/1 – 12/31/22 _____
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: _____) \$ _____