

# 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.

#### 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..... \$ \_\_\_\_\_