

**RENTAL INCOME & EXPENSES**  
**Schedule E**

Property Address  
Property Cost and Purchase Date

**Income:**

Total Rents Received  
Total Deposits Received  
Total Deposits Refunded  
Total Deposits Forfeited

**Expenses:**

Advertising  
Mileage Related to this Rental  
Travel Expenses  
    Meals  
    Lodging  
Cleaning  
Maintenance  
Commissions  
Insurance  
Legal/Professional Fees  
Management Fees  
Mortgage Interest  
Other Interest Paid  
Repairs\*\*  
Supplies  
Taxes  
Utilities  
Pest Control  
Office Supplies

**\*\* Schedules C, E, and F**

**Individual repair invoices over \$2500 must be depreciated. We will need Purchase Date, Description of Repair, and Cost.**

**OTHER DEDUCTIONS/CREDITS**

**Education Credit** –Form 1098-T from College must be submitted to IRS with tax return. Don't forget cost of Books, Fees, Course Supplies, and Computer.

**Student Loan Interest**

**IRA Contributions**

**College Savings Plans (529) Contributions**  
(MS & LA Deduction)

**LOUISIANA RESIDENTS ONLY**

**Homeowner's Insurance Citizens FAIR Plan Assessment** – Bring insurance declaration page showing cost, policy number, Citizens FAIR Plan Assessment.

**LA School Tuition & Expense** – Elementary & Secondary School Tuition, Home School Expenses, Uniforms, Textbooks, School Supplies. Need each amount separately per student and per category.

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Be Prepared and Be Informed!  
Lower your taxes and  
Maximize your tax refund!

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***Office Partners***

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***Office Partners***  
***Tax Service***

**(601) 799-5902**

**(601) 749-9339**

***Call now for your appointment.***

***Worksheets available at***  
**[www.officepartnerstax.com](http://www.officepartnerstax.com)**

**Items to Bring for Your Appointment**

- Driver's Licenses & Social Security Cards
- New dependents (Never claimed by you)– Bring Social Security Card & Birth Certificate
- Proof of Health Insurance for everyone on your return.
- W-2's
- 1099's
- Social Security Statements
- Unemployment Compensation Statement
- Gambling Winnings – W-2G, Win/Loss Statement
- Interest/Dividend Statements
- 1099-B Sale of Stocks/Mutual Funds & Cost Basis/Purchase Info
- Bankruptcy Papers
- 1098-T from College
- Health Insurance Related Forms - 1095-A, 1095-B, 1095-C

**ITEMIZED DEDUCTIONS**  
**Schedule A**

**Medical Expenses** (*must exceed 10% of income*)

Drs. Visits, Hospital, Ambulance, Chiropractor  
Dental Costs, Dentures  
Prescription Drugs, Insulin  
Medical, Dental, Cancer, Long-Term Care  
Insurance (paid out-of-pocket)  
Acupuncture Services  
Eye Exams, Glasses/Contacts  
Artificial Limbs, Support or Corrective Devices  
Hearing Aids & Batteries  
Lab Tests, Therapy, X-Rays  
Medical Care in Home, Nurses (expense/board)  
Rental/purchase of medical equipment  
Special schooling/transportation for handicapped  
Lodging while away from home for medical  
Mileage to/from each of above

**Taxes:**

Real Estate Taxes  
Sales Tax on major purchases-cars, boats, RV,  
motorcycles, home improvements, electronics)  
Automobile/trailer tags (ad valorem taxes only)  
Mortgage Interest and Points

**Charitable Contributions** (*must have receipts*)

Cash/Checks to church and charities  
Donation of goods (ie, Goodwill, Jacob's Well)  
Mileage - volunteer work (ie, VFD, Scouts)

**Non-reimbursed Employee Expenses**

(*must exceed 2% of income*)

Professional and Union Dues  
Safety equipment (shields, goggles, gloves)  
Tools, Supplies, Uniforms, Boots  
Continuing Education, Licenses, Publications  
Travel Expenses (*not commuting to regular job*)  
Job Searching Expenses  
Work-related Physicals  
Tax Preparation Fees  
Safe Deposit Box Rental  
IRA Custodian Fees  
Gambling Losses to Extent of Taxable Winnings

**BUSINESS INCOME & EXPENSES**  
**Schedule C**

**Income**

**Interest Income**

**Expenses:**

Advertising & Website  
Contract Labor  
Insurance  
Self-Employed Health Insurance  
Interest on Business-Related Loans  
Legal & Professional Fees (Accounting)  
Office Expense (Supplies, Postage, etc)  
Rent – Building  
Rent – Vehicles, Machinery, Equipment  
Repairs & Maintenance \*\*  
Supplies \*\*  
Taxes and Licenses  
Travel (Hotels, Airfare, Luggage Fees,  
Rental Cars, etc)  
Meals & Entertainment  
Utilities  
Wages (W-2)  
Business Phones  
Building Materials  
Internet (if used for business)  
Professional Dues  
Continuing Education  
Publications  
Small Tools (under \$500)  
Uniforms  
Items Purchased for Resale (Inventory)  
Business Mileage  
*Anything else you spent money on for the business.*

**Equipment Purchased/Sold**

Date of Purchase or Date of Sale  
Cost or Sales Price  
Description of Equipment

**FARM INCOME & EXPENSES**  
**Schedule F**

**Income:**

Sale of Livestock Raised  
Sale of Crops  
Sale of Livestock Purchased  
Cost of Livestock Sold  
Miscellaneous Products  
Other Farm Income  
Custom Hire Income

**Expenses:**

Advertising  
Chemicals  
Conservation  
Contract Labor  
Feed  
Fertilizer and Lime  
Insurance  
Interest Expense  
Labor Paid  
Machine Hire  
Rental of Farm Land or Pasture  
Rental of Equipment  
Repairs & Maintenance \*\*  
Seeds  
Storage & Warehousing  
Taxes  
Supplies  
Publications  
Travel (Lodging), Meals & Entertainment  
Utilities/Telephone  
Veterinary Fees, Medicines, Breeding Fees  
Small Tools (under \$500)  
Farm Related Mileage

**Equipment Purchased/Sold**

Date of Purchase or Date of Sale  
Cost or Sales Price  
Description of Equipment