

RENTAL AND DIVIDEND INCOME STATEMENT

Statement of Passive Income

Taxpayer
Name:

SSN / TIN:

Tax
Year/Period:

Date
Prepared:

SECTION 1: RENTAL REAL ESTATE INCOME & EXPENSES

Property Address: _____

Income Category	Amount (\$)
Gross Rental Revenue / Rent Received	
Other Income (Parking, Laundry, Utilities, etc.)	
Total Rental Income (A)	

Expense Category	Amount (\$)
Advertising	
Auto and Travel	
Cleaning and Maintenance	
Insurance	
Legal and Professional Fees	
Management Fees	
Mortgage Interest Paid to Banks	
Repairs	
Supplies	
Taxes (Property, State, Local)	
Utilities	
Depreciation Expense / Amortization	

Expense Category	Amount (\$)
Other Expenses	
Total Rental Expenses (B)	
Net Rental Income / Loss (A - B)	

SECTION 2: DIVIDEND INCOME

Payer / Financial Institution Name	Type (Ordinary / Qualified)	Amount (\$)
Total Dividend Income (C)		

Net Rental Income / Loss (A - B): \$ _____

Total Dividend Income (C): \$ _____

TOTAL PASSIVE INCOME (Net Rental + Dividends): \$ _____

Taxpayer Signature

Date