

**Business/Investment Questions**

**ORG4**

	Yes	No
<b>1</b> Did you receive stock from a stock bonus plan with your employer? ..... (Do not include stock sales included on your W-2.)	<input type="checkbox"/>	<input type="checkbox"/>
<b>2</b> Did you buy or sell any stocks or bonds in 2016? ..... If <b>yes</b> , attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	<input type="checkbox"/>	<input type="checkbox"/>
<b>3</b> Did you surrender any U.S. savings bonds during 2016? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>4</b> Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>5</b> Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>6</b> Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>7</b> Do you have any investments for which you were <b>not</b> personally 'at risk' (other than sole proprietorship or farm)? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>8</b> Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2016? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>9</b> Did you sell property or equipment on installment in 2016? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>10</b> Did you have any business related educational expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>11</b> Did you do a 'like-kind' exchange of property in 2016? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>12</b> Do you have records, as described below, to support expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
Tax law and IRS regulations allow deductions for travel and entertainment if adequate records can be presented. Information must include: <b>1</b> Amount; <b>2</b> Time and place; <b>3</b> Date; <b>4</b> Business purpose; <b>5</b> Description of gift(s); and <b>6</b> Business relationship of recipient.		
<b>13</b> Did you purchase special fuels for non-highway use? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , please list the type of use and the number of gallons for each fuel.		
_____		
_____		
_____		
_____		
<b>14</b> Was Form 8903 (Domestic Production Activities Deduction) included in your 2015 federal income tax return? .....	<input type="checkbox"/>	<input type="checkbox"/>

# Rent and Royalty Income and Expenses

ORG25

## BASIC PROPERTY INFORMATION

Property description: \_\_\_\_\_  
 Property type: \* \_\_\_\_\_ If type is other, enter a description: \_\_\_\_\_  
 Location (street address): \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 If a foreign address: Foreign province or state: \_\_\_\_\_  
 Foreign postal code: \_\_\_\_\_ Foreign Country: \_\_\_\_\_

1 Check property owner .....  **Taxpayer**       **Spouse**       **Joint**

	Yes	No
2 a Did you make any payments that would require you to file Form(s) 1099? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If <b>yes</b> , did you or will you file all required Forms(s) 1099? .....	<input type="checkbox"/>	<input type="checkbox"/>

3 a Enter the ownership percentage (if not 100%) .....		
b If not 100%, are you reporting 100% of the income and expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>

4 Is this a rental property? (If **yes**, answer questions 5 through 11; if **no**, skip to question 12.) .....  Yes  No

5 Did you have personal use of this property or rent it for part of the year at less than fair rental value? .....  Yes  No

6 For all rental properties, **enter the number of days** during 2016 that:

a The property was rented at fair rental value .....		
b The property was used personally or rented at less than fair rental value .....	_____	_____
c You owned the property, if not the entire year .....	_____	_____

7 a Does this rental have multiple living units and you live in one of the units? .....  Yes  No

  b If **yes**, enter percentage of rental use .....

8 Did you actively participate in this property's management during 2016 ? .....  Yes  No

9 Did you materially participate in this property's management during 2016 ? .....  Yes  No

10 Do you want to treat this property as non-passive?.....  Yes  No

11 Did this property have unallowed passive losses in 2015 ? .....  Yes  No

12 Did you dispose of this property in a fully taxable transaction? .....  Yes  No

13 Check this box if some of this investment was **not** at-risk.....  Yes  No

14 a Treat all MACRS assets for this activity as qualified Indian reservation property? .....  Yes  No

  b Treat all assets acquired after August 27, 2005 as qualified GO Zone property?..... **Regular**  **Extension**  **No**

  c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? .....  Yes  No

  d Was this activity located in a Qualified Disaster Area?.....  Yes  No

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2016	2015			
15 Rents or royalties received .....					
<table style="width: 100%; border: none;"> <tr> <td style="width: 30%; vertical-align: top;">* <b>Property Types:</b></td> <td style="width: 35%; vertical-align: top;"> <b>1</b> Single family residence  <b>2</b> Multi-family residence  <b>3</b> Vacation/short-term rental  <b>4</b> Commercial                 </td> <td style="width: 35%; vertical-align: top;"> <b>5</b> Land  <b>6</b> Royalties  <b>7</b> Self-rental  <b>8</b> Other                 </td> </tr> </table>	* <b>Property Types:</b>	<b>1</b> Single family residence <b>2</b> Multi-family residence <b>3</b> Vacation/short-term rental <b>4</b> Commercial	<b>5</b> Land <b>6</b> Royalties <b>7</b> Self-rental <b>8</b> Other		
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**Rent and Royalty Income and Expenses (continued)**

**ORG25**

EXPENSES	2016	2015
Property location .....		
<b>16</b> Advertising .....		
<b>17 a</b> Automobile (complete ORG18 for autos).....		
<b>b</b> Travel.....		
<b>18</b> Cleaning and maintenance .....		
<b>19</b> Commissions.....		
<b>20 a</b> Mortgage insurance premiums – qualified .....		
<b>b</b> Other insurance .....		
<b>21</b> Legal and professional fees .....		
<b>22</b> Management fees .....		
<b>23 a</b> Mortgage interest paid to banks – qualified.....		
<b>b</b> Mortgage interest paid to banks – other .....		
<b>24</b> Other interest .....		
<b>25</b> Repairs.....		
<b>26</b> Supplies.....		
<b>27 a</b> Real estate taxes.....		
<b>b</b> Other taxes .....		
<b>28</b> Utilities .....		
<b>29</b> Other expenses:		
<b>a</b> .....		
<b>b</b> .....		
<b>c</b> .....		
<b>d</b> .....		
<b>e</b> .....		
<b>30 a</b> Depreciation and Section 179 deduction <b>(Preparer Use Only)</b> .....		
<b>b</b> Depletion <b>(Preparer Use Only)</b> .....		

# Depreciation Entry Worksheet

ORG51A

for:

**ASSET INFORMATION**  
Enter vehicles on ORG17 for employees, ORG18 for all others

Description of asset .....	Percentage of business use..... %
Date placed in service .....	Section 179 deduction .....
Cost or basis .....	Land included in cost.....
Type of asset.....	

**Note:** Assets placed in service after 1998 use the same recovery period for both regular tax and AMT.

Economic Stimulus – Qualified Property .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Cellulosic Biomass Ethanol Plant Property (CBEPP) - Qualified Property.....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Qualified Disaster Area – Qualified Property .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Kansas Disaster Zone – Qualified Property .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Gulf Opportunity Zone – Qualified Property .....	<input type="checkbox"/>	Regular	<input type="checkbox"/>	Extension
In service in GO Zone Extension building within 90 days of building.....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Percentage for Special Depreciation Allowance .....	<input type="checkbox"/>	100% & 50%	<input type="checkbox"/>	30%
Elect OUT of Special Depreciation Allowance.....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Elect 30% in place of 50% Special Depreciation Allowance.....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Special Depreciation Allowance.....				
AMT Special Depreciation Allowance .....				

Enter the IRC section under which you amortize the cost of intangibles .....

Type F: Check if a prior year return amended or Form 3115 filed to change recovery period to 5 years.....

Check if General Asset Account .....

Prior depreciation..... AMT prior depreciation.....

Info on state depreciation and like-kind exchange property may be entered after transfer to ProSeries 1040.

**DISPOSITIONS**  
Enter business portion only for sales price and expense of sale

Date of disposition.....	Date acquired (if different from Date in service).....		
Report land separately? .....	<input type="checkbox"/> Yes <input type="checkbox"/> No	Asset	Land
Sales price.....			
Expense of sale.....			
Property type .....			
Section 179 deduction allowed.....			
If Section 1250:	Additional depreciation after 1975 .....		
	Applicable percentage .....		%
	Additional depreciation after 1969 and before 1976 .....		
Sale may be linked to Form 6252 or the Home Sale Worksheet after transfer to ProSeries 1040.			
Gain/loss basis, if different .....		AMT gain/loss basis, if different .....	
Check to compute personal residence depreciation after May 6, 1997 .....			<input type="checkbox"/>

**DETAIL ASSET INFORMATION**  
This section is calculated for most assets from the data entered above.

Listed property?.....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Subject to auto limitations? .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Truck or van? .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Electric passenger vehicle?.....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If General Asset Account, number of autos for current year limitation.....				
Heavy SUV? .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Eligible Section 179 property (current year assets only)?.....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Use IRS tables for MACRS property? .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Qualified Indian reservation property?.....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Depreciation type .....				AMT basis, if different.....
Asset class .....				Type for pre-'87 assets .....
Depreciation method .....				AMT depreciation method .....
MACRS convention.....				
Year of depreciation .....				
Recovery period.....				AMT recovery period .....
Depreciable basis.....				AMT depreciable basis .....