



The Educational Opportunity Fund Program
2023-2024 Supporting Documents

Rental Real Estate, Royalties, Partnerships, S Corporations, & Trusts Form

Student's Name: _____

855#: _____

According to the **2021 IRS form 1040 Schedule 1: Additional Income & Adjustments to Income** submitted, "**Rental Real Estate, Royalties, Partnerships, S Corporations, Trusts, etc.**" was reported on **line 5**. Please complete the form below and attach **Schedule E** from the 2021 1040s.

▪ **Source of income or loss:**

Rental Real Estate

Royalties

S Corporations

Partnerships

Trusts Funds

If the source is "**Rental Real Estate**", please submit the **Tax Assessment Card** and **Most Recent Mortgage Statement** for each property and answer the questions below:

▪ **Total number of properties owned**

0

2

4

1

3

5

▪ **Property 1**

○ **Address:** _____

○ **Assessment (Tax Assessment Card)\$** _____

○ **Principle Balance (Mortgage Statement)\$** _____

▪ **Property 2**

○ **Address:** _____

○ **Assessment (Tax Assessment Card)\$** _____

○ **Principle Balance (Mortgage Statement)\$** _____

I certify that the information provided above is correct and complete to the best of my (our) knowledge.

Parent Signature: _____

Date: _____



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2023-2024 Supporting Documents

EXAMPLE

Rental Real Estate, Royalties, Partnerships, S Corporations, & Trusts Form

Student's Name: John Doe

855#: 080808

According to the **2021 IRS form 1040 Schedule 1: Additional Income & Adjustments to Income** submitted, "**Rental Real Estate, Royalties, Partnerships, S Corporations, Trusts, etc.**" was reported on **line 5**. Please complete the form below and attach **Schedule E** from the 2020 1040s.

▪ **Source of income or loss:**

Rental Real Estate

Royalties

S Corporations

Partnerships

Trusts Funds

If the source is "**Rental Real Estate**", please submit the **Tax Assessment Card** and **Most Recent Mortgage Statement** for each property and answer the questions below:

▪ **Total number of properties owned**

0

2

4

1

3

5

▪ **Property 1**

○ **Address:** 300 Pompton Road, Wayne, NJ 07470

○ **Assessment (Tax Assessment Card)** \$123,000

○ **Principle Balance (Mortgage Statement)** \$456,000

EXAMPLE

▪ **Property 2**

○ **Address:** _____

○ **Assessment (Tax Assessment Card)** \$ _____

○ **Principle Balance (Mortgage Statement)** \$ _____

I certify that the information provided above is correct and complete to the best of my (our) knowledge.

Parent Signature: John Doe Sr.

Date: 9/15/22