



The Educational Opportunity Fund Program
2022-2023 Supporting Documents

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

Student's Name: _____

855#: _____

According to the **2020 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:** _____

○ **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: _____

EXAMPLE



The Educational Opportunity Fund Program
2022-2023 Supporting Documents

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

Student's Name: John Doe

855#: 080808

According to the 2020 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: 9/15/21