



The Educational Opportunity Fund Program  
2024-2025 Supporting Documents

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

Student's Name: \_\_\_\_\_ 855#: \_\_\_\_\_

According to the **2022 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 2022 1040s.

▪ **Source of income or loss:**

- |   |                                       |   |
|---|---------------------------------------|---|
| <input type="checkbox"/> Rental Real Estate | <input type="checkbox"/> Royalties    | <input type="checkbox"/> S Corporations |
|   | <input type="checkbox"/> Partnerships | <input type="checkbox"/> 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**

- |                            |                            |                            |
|----------------------------|----------------------------|----------------------------|
| <input type="checkbox"/> 0 | <input type="checkbox"/> 2 | <input type="checkbox"/> 4 |
| <input type="checkbox"/> 1 | <input type="checkbox"/> 3 | <input type="checkbox"/> 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: \_\_\_\_\_



The Educational Opportunity Fund Program  
2024-2025 Supporting Documents

**EXAMPLE**

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

Student's Name: John Doe

855#: 080808

According to the **2022 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 2022 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: 9/15/23