

**EY TaxChat 2018**  
**Rental Income and Expense Information Instructions**

Because you owned a rental property in 2018, we will need details on your income and related expenses. If you have existing rental property reports that contain this information (e.g., Excel spreadsheets, QuickBooks reports, or other summary information) please upload them for our review. Otherwise, please fill out the below form. If you have multiple rental properties, please complete one version of the form for each property.

Please note that if you rent out your home on a part-time basis, this information is only required if you rented your home (primary residence or vacation property) for more than 14 days per year.

More information can be found here: <https://www.irs.gov/publications/p527> and here: <https://www.irs.gov/taxtopics/tc415>

Please note that not all mobile phones support fillable .pdf forms. You can also access these forms at [www.tax.chat](http://www.tax.chat).



Location of Property:

TSJ  
Type of property

Yes	No
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Have you prepared or will you prepare all required Forms 1099?

Ownership percentage if not 100%  
How many days was this property rented at fair market value?  
How many days was this property used personally (including use by family members)?

2018	2017
%	

Income:

Rents received  
Royalties received

2018 Amount	2017 Amount

Payment card and third party transactions: Include all Forms 1099-K

Description	2018 Amount	2017 Amount

Miscellaneous income: Include all Forms 1099-MISC

Description	2018 Amount	2017 Amount

Other income:

Description	2018 Amount	2017 Amount



2018

Rental and Royalty Expenses

10A

Location of Property: \_\_\_\_\_

Expenses:

	2018 Amount	2017 Amount
Advertising . . . . .		
Auto and travel . . . . .		
Cleaning and maintenance . . . . .		
Commissions . . . . .		
Insurance . . . . .		
Legal and other professional fees . . . . .		
Management fees . . . . .		
Mortgage interest paid to banks, etc. . . . .		
Mortgage interest paid to individuals . . . . .		
Other interest . . . . .		
Repairs . . . . .		
Supplies . . . . .		
Taxes . . . . .		
Utilities . . . . .		
Dependent care benefits . . . . .		
Employee benefits . . . . .		
Other Expenses:		

Description	2018 Amount	2017 Amount



2018

# Rental and Royalty Property and Equipment & Depletion

10B

Location of Property: \_\_\_\_\_

Property and Equipment: 

Include a list if more space is needed
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**Acquisitions:**

X if not new	Description	Date Acquired (Mo/Da/Yr)	Cost

**Dispositions:**

Description	Date Acquired (Mo/Da/Yr)	Cost	Date Sold (Mo/Da/Yr)	Selling Price

**Percentage Depletion Information:**

Production Type	Royalty Income	
	2018 Amount	2017 Amount