

PREPARATION CHECKLIST

Rental Property Checklist

To assist us in preparing your rental property schedule, please use this checklist when you compile your information. Completing the checklist can take some time and effort however your efforts will enable us to process your work more efficiently. This can lead to both time and cost savings as we will not need to come back to you with further requests for information, thus delaying the processing of your tax return.

PLEASE ENSURE YOU COMPLETE ALL RELEVANT QUESTIONS AND PROVIDE ADDITIONAL INFORMATION AS REQUIRED

Property Details	
Address	
No. of weeks property was rented this year	
<i>If this property is managed by a real estate agent please attach the annual statement and include only any additional income and/or expenses not shown on the statement.</i>	

Income	Amount
Rental Income	
Other rental related income	

Expenses	Amount
Advertising for tenants	
Body corporate fees	
Borrowing expenses	
Cleaning	
Council rates	
Gardening/lawn mowing	
Insurance	
Interest on loans <i>(please include a copy of the annual loan statement)</i>	
Expenses	Amount

PLEASE ENSURE YOU SUPPLY ALL DOCUMENTATION REQUIRED IF ANY ITEMS ABOVE ARE RELEVANT TO YOU

Land tax	
Legal fees	
Pest control	
Property agent fees/commission	
Repairs and maintenance	
Stationery	
Telephone	
Postage	
Water charges	
<i>Sundry rental expenses</i>	
1.	
2.	
3.	
4.	

Quantity Surveyors

If you have obtained a quantity surveyors report (depreciation report) please provide a copy of the report to us.

New Property Purchase

If you have purchased a new rental property, please provide us with a copy of the purchase contract and settlement statement. If you have sold a rental property, please provide us with a copy of the contract of sale and settlement statement.

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