

TAX RETURN CHECKLIST Rental Property

Address of property			
Suburb		State	
Postcode			
Date property first earned rental income		Number of weeks available for rent during the year	

	YES	NO
Do you share ownership of the property?	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Name and % ownership <div style="border: 1px solid #ccc; width: 100%; height: 20px; margin-top: 5px;"></div>		
<input type="radio"/> Name and % ownership <div style="border: 1px solid #ccc; width: 100%; height: 20px; margin-top: 5px;"></div>		

	YES	NO
Was the property purchased during the year?	<input type="checkbox"/>	<input type="checkbox"/>
<i>If yes, please provide a copy of the following documents</i>	PROVIDED	N/A
<input type="radio"/> Purchase contract	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Settlement statement	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Loan statements, if applicable	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Other expenses incurred in purchasing the property <i>e.g. Registration fees, building & pest inspections, search fees</i>	<input type="checkbox"/>	<input type="checkbox"/>

	YES	NO
Was the property sold during the year?	<input type="checkbox"/>	<input type="checkbox"/>
<i>If yes, please provide a copy of the following documents</i>	PROVIDED	N/A
<input type="radio"/> Sale contract	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Settlement statement	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Other expenses incurred in sale of the property <i>e.g. Legal fees, advertising, commission on sale</i>	<input type="checkbox"/>	<input type="checkbox"/>

	PROVIDED	N/A
Please provide a copy of the following documents		
<input type="radio"/> Annual rental property statement from agent	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Loan statements for the year	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Summary of other rental expenses (not paid by agent)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> Property tax depreciation report, if applicable	<input type="checkbox"/>	<input type="checkbox"/>

Please complete all applicable items in the following section

INCOME

Gross **rental income** received

Other rental income
e.g. reimbursements & recoupments

EXPENSES

Advertising for tenants

Body corporate fees

Cleaning

Council rates

Electricity

Gardening/lawn mowing

Gas

Insurance

Interest on loan/s

Pest control

Agent fees/commission

Repairs and maintenance

Stationery, telephone & postage

Water rates

Other rental expenses

YES

NO

Did you **purchase any assets** for the property during the year?

Date purchased, description, and cost