

## TAX RETURN CHECKLIST

### Rental Property

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

	YES	NO
Do you <b>share ownership</b> of the property?	<input type="checkbox"/>	<input type="checkbox"/>
o Name and % ownership		
o Name and % ownership		

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

	YES	NO
Was the property <b>sold</b> during the year?	<input type="checkbox"/>	<input type="checkbox"/>
<i>If yes, please provide a copy of the following documents</i>	<b>PROVIDED</b>	<b>N/A</b>
o Sale contract	<input type="checkbox"/>	<input type="checkbox"/>
o Settlement statement	<input type="checkbox"/>	<input type="checkbox"/>
o 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
<b>Please provide a copy of the following documents</b>		
o Annual rental property statement from agent	<input type="checkbox"/>	<input type="checkbox"/>
o Loan statements for the year	<input type="checkbox"/>	<input type="checkbox"/>
o Summary of other rental expenses (not paid by agent)	<input type="checkbox"/>	<input type="checkbox"/>
o 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