

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"/>
<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;"> <input type="radio"/> Name and % ownership </div> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>		
<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;"> <input type="radio"/> Name and % ownership </div> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>		
<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;"> <input type="radio"/> Name and % ownership </div> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>		

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"/>

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"/>

Please provide a copy of the following documents	PROVIDED	N/A
<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"/> Quantity surveyor report, if applicable	<input type="checkbox"/>	<input type="checkbox"/>

Please complete all applicable items in the following section

INCOME

o Gross **rental income** received

o **Other rental income**
e.g. reimbursements & recoupments

EXPENSES

o Advertising for tenants

o Body corporate fees

o Cleaning

o Council rates

o Electricity

o Gardening/lawn mowing

o Gas

o Insurance

o Interest on loan/s

o Land tax

o Pest control

o Property management fees

o Repairs and maintenance

o Stationery, telephone & postage

o Water rates

o Other rental expenses
e.g. security monitoring costs, legal costs, borrowing expenses

YES

NO

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

☐☐

o Date purchased, description and cost