



2023 RENTAL PROPERTY CHECKLIST

PLEASE ALSO REFER TO INDIVIDUAL TAX CHECKLIST AS THIS ONLY RELATES TO RENTAL SCHEDULE ITEMS

PROPERTY DETAILS	EXPENDITURE	RECEIPT	STATEMENT
ADDRESS _____	ADVERTISING FOR TENANTS \$ _____	<input type="checkbox"/>	
CITY _____ STATE _____ P/CODE _____	BANK FEES ON LOAN(S) \$ _____		<input type="checkbox"/>
DATE FIRST EARNED RENTAL INCOME ____/____/____	BODY CORPORATE FEES \$ _____	<input type="checkbox"/>	
NO. WEEKS RENTED OUT _____ PRIVATE USE _____ days used	BORROWING EXPENSES \$ _____		<input type="checkbox"/>
	CLEANING EXPENSES \$ _____	<input type="checkbox"/>	
	COUNCIL RATES \$ _____	<input type="checkbox"/>	
	GARDENING / LAWN MOWING \$ _____	<input type="checkbox"/>	
	INSURANCE \$ _____	<input type="checkbox"/>	
	INTEREST ON LOANS \$ _____		<input type="checkbox"/>
	LAND TAX \$ _____	<input type="checkbox"/>	
	LEGAL FEES \$ _____	<input type="checkbox"/>	
	PEST CONTROL \$ _____	<input type="checkbox"/>	
	PROPERTY AGENTS FEES \$ _____		<input type="checkbox"/>
	STATIONERY, PHONE, POSTAGE \$ _____	<input type="checkbox"/>	
	REPAIRS & MAINTENANCE \$ _____	<input type="checkbox"/>	
	WATER CHARGES \$ _____	<input type="checkbox"/>	
	DEPRECIATION SCHEDULE FEE \$ _____		<input type="checkbox"/>
	_____ \$ _____		
	_____ \$ _____		
	_____ \$ _____		

INCOME

GROSS RENT \$ _____ OTHER RENTAL INCOME \$ _____

CAPITAL PURCHASES

ASSET _____	DATE ____/____/____
ASSET _____	DATE ____/____/____
ASSET _____	DATE ____/____/____
ASSET _____	DATE ____/____/____
ASSET _____	DATE ____/____/____

PLEASE PROVIDE THE FOLLOWING

- Real Estate Agent Annual Summary Statement
- Bank statements on Investment Loan(s) 1 JUL 22 - 30 JUN 23
- Property Depreciation Schedule
- Receipts/Invoices for any expenditure incurred in year
- IF NEW** - All purchase documents, conveyancing etc.
- IF SOLD** - All sale documents, conveyancing, legal fees

Please tick box where a receipt or agent/loan statement has been provided.

****WARNING - All loan bank statements must be provided to your accountant. You should not redraw on your investment property loan/s for private use otherwise your interest claim will need to be apportioned****

Please ensure you also provide BSB and ACCT NO for ATO Refunds

NEW CLIENTS: Please ensure you have provided to reception or your accountant a copy of last lodged TAX RETURN for depreciation items



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