

## INFORMATION REQUIRED FOR A RENTAL PROPERTY



Please provide following information for each rental property – bring in paperwork or fill in below

Property address: \_\_\_\_\_

Owners' name(s): \_\_\_\_\_

Shared Ownership Percentage: \_\_\_\_\_

Dates available for rent during the year: \_\_\_\_\_

**Total Rental Income received** (Real Estate Agent statement) \_\_\_\_\_

### **Expenditures**

- Council Rates \_\_\_\_\_
- Body Corporate Fees (if applicable) \_\_\_\_\_
- Water & Sewerage/ Gas Expenses \_\_\_\_\_
- List of Repairs and Maintenance (Gardening, Lawn Mowing etc) \_\_\_\_\_
- Pest Control \_\_\_\_\_
- Advertising Cost \_\_\_\_\_
- Cleaning \_\_\_\_\_
- Travel Expenses relating to the property (If applicable) \_\_\_\_\_
- Stationary, Telephone, Postage \_\_\_\_\_
- Interest on rental Property (if applicable) \_\_\_\_\_
- Property Agent Fees (if using real estate agent) \_\_\_\_\_
- Bank fees on Loan(s) \_\_\_\_\_
- Insurance on Property & contents \_\_\_\_\_
- Mortgage Insurance and Establishing fees \_\_\_\_\_
- Cost and date of items purchased for the property i.e. Stove, Hot Water System, Air conditioners, Carpets, etc. \_\_\_\_\_
- Other- Please specify \_\_\_\_\_
  
- Depreciation Schedule (if applicable)
- Special Building write off

**New Property:** Require settlement Statement

**Sold Property:** All records of purchase and sale

## INFORMATION REQUIRED FOR A BUSINESS

- Summary of Income & Expenses or backup of computerised accounting software
- List of assets purchased for the business together with cost of items and purchased date
- Superannuation Contributions
- New Clients: Prior year financial statements, depreciation schedules and tax returns