

## INFORMATION REQUIRED FOR A RENTAL PROPERTY



Please provide following information for each rental property

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 \_\_\_\_\_  
Provide a list detailing items and cost per item
- Depreciation Schedule (if applicable)
- Special Building write off

**New Property:** Require settlement Statement

**Sold Property:** All records of purchase and sale plus Settlement Statement

## INFORMATION REQUIRED FOR A BUSINESS / SOLE TRADER

- Summary of Income & Expenses
- List of assets purchased for the business together with cost of items and purchased date
- Superannuation Contribution
- New Clients: Prior year financials and tax returns incl depreciation schedules

The following can also be provided

- USB at the time of your tax appt or you can email your zipped files to [trezonafiles@hotmail.com](mailto:trezonafiles@hotmail.com) preferably 1 week prior to your scheduled appt or as soon as possible
- Phone/f2f appts – all supporting information must be received by this office 1 week prior to your tax appointment