



MORE THAN TAX

Rental Property Tax Checklist

Your Details

Client Name: _____

Date: _____

Rental Property Details

Purchase Date & Price:

Date property first rented:

No. of weeks property was rented this year:

Commercial or Residential:

Ownership Interest - who owns the Property and in what percentages (%):

More Than Tax - Rental Property Tax Checklist

<i>Income</i>	<i>Tick if relevant</i>	<i>Amount \$ / Comment</i>	<i>Document</i>
Managed by Real Estate Agent - <i>please provide Rental Income Tax Statement</i>	_____	_____	_____
Self-Managed - <i>please provide records of rent received from tenants</i>	_____	_____	_____
 <i>Expenses</i>			
Body Corporate	_____	_____	_____
Council Rates	_____	_____	_____
Depreciation <i>(please provide Quantity Surveyors Report if not previously provided)</i>	_____	_____	_____
Gardening/ Lawn Mowing	_____	_____	_____
Insurance	_____	_____	_____
Interest on Loan <i>(please provide loan statements showing <u>interest paid</u> for the financial year)</i>	_____	_____	_____
Land Tax	_____	_____	_____
Property agent fees	_____	_____	_____
Repairs and maintenance <i>(directly related to wear & tear or damage as a result of renting the property)</i>	_____	_____	_____
Stationery, telephone and postage	_____	_____	_____
Water Rates	_____	_____	_____
Capital Improvements	_____	_____	_____
<i>(renovations, extensions, initial repairs that existed as at when you purchased the property)</i>	_____	_____	_____
Other Expenses <i>(advertising for tenants, cleaning, legal fees, pest control, travel expenses)</i>	_____	_____	_____