



# INSIGHT

ACCOUNTING – LENDING – FINANCIAL PLANNING – INSURANCE

## 2020 RENTAL PROPERTY CHECKLIST

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

### PROPERTY DETAILS

ADDRESS \_\_\_\_\_  
 CITY \_\_\_\_\_ STATE \_\_\_\_\_ P/CODE \_\_\_\_\_  
 DATE FIRST EARNED RENTAL INCOME \_\_\_\_/\_\_\_\_/\_\_\_\_  
 NO. WEEKS RENTED OUT \_\_\_\_\_ PRIVATE USE \_\_\_\_\_ days used

### 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 19 - 30 JUN 20
- Property Depreciation Schedule (i.e. BMT, Deppro etc.)
- Receipts/Invoices for any expenditure incurred in year
- IF NEW** - All purchase documents, conveyancing etc.
- IF SOLD** - All sale documents, conveyancing, legal fees

### EXPENDITURE

ADVERTISING FOR TENANTS \$ \_\_\_\_\_  
 BANK FEES ON LOAN(S) \$ \_\_\_\_\_  
 BODY CORPORATE FEES \$ \_\_\_\_\_  
 BORROWING EXPENSES \$ \_\_\_\_\_  
 CLEANING EXPENSES \$ \_\_\_\_\_  
 COUNCIL RATES \$ \_\_\_\_\_  
 GARDENING / LAWN MOWING \$ \_\_\_\_\_  
 INSURANCE \$ \_\_\_\_\_  
 INTEREST ON LOANS \$ \_\_\_\_\_  
 LAND TAX \$ \_\_\_\_\_  
 LEGAL FEES \$ \_\_\_\_\_  
 PEST CONTROL \$ \_\_\_\_\_  
 PROPERTY AGENTS FEES \$ \_\_\_\_\_  
 STATIONERY, PHONE, POSTAGE \$ \_\_\_\_\_  
 REPAIRS & MAINTENANCE \$ \_\_\_\_\_  
 WATER CHARGES \$ \_\_\_\_\_  
 DEPRECIATION SCHEDULE FEE \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

### OUR WIDE RANGE OF IN-HOUSE SERVICES CAN ASSIST YOUR BUSINESS WITH ANY ENQUIRY

ACCOUNTING



FINANCIAL PLANNING



MORTGAGE BROKING



INSURANCE



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

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



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#### PAKENHAM

122 Main Street  
 PAKENHAM VIC 3810  
 (03) 5940 4555

#### CRANBOURNE

Office 2, Level 1,  
 125 South Gippsland Hwy,  
 Cranbourne Park Shopping  
 Centre  
 (03) 5995 2700

#### BEACONSFIELD

Shop 1, 6-10 Old Princes Hwy,  
 BEACONSFIELD VIC 3807  
 (03) 9707 0555

#### WARRAGUL

Shop 1C  
 Warragul Shopping Plaza  
 Corner Victoria & Smith Street,  
 WARRAGUL VIC 3820  
 (03) 5622 1793