



INSIGHT

ACCOUNTING – LENDING – FINANCIAL PLANNING – INSURANCE

2021 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 20 - 30 JUN 21
- 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 provided to reception or your accountant a copy of last lodged TAX RETURN for depreciation items



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www.insightaccounting.com.au

PAKENHAM

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 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