



ACCOUNTING - BOOKKEEPING & PAYROLL - LENDING - FINANCIAL PLANNING - INSURANCE

2023 RENTAL PROPERTY CHECKLIST

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

PROPERTY DETAILS	EXPENDITURE	RECEIPT	STATEMENT
ADDRESS _____	ADVERTISING FOR TENANTS \$ _____	<input type="checkbox"/>	
CITY _____ STATE _____ P/CODE _____	BANK FEES ON LOAN(S) \$ _____		<input type="checkbox"/>
DATE FIRST EARNED RENTAL INCOME ____/____/____	BODY CORPORATE FEES \$ _____	<input type="checkbox"/>	
NO. WEEKS RENTED OUT _____ PRIVATE USE _____ days used	BORROWING EXPENSES \$ _____		<input type="checkbox"/>
	CLEANING EXPENSES \$ _____	<input type="checkbox"/>	
	COUNCIL RATES \$ _____	<input type="checkbox"/>	
	GARDENING / LAWN MOWING \$ _____	<input type="checkbox"/>	
	INSURANCE \$ _____	<input type="checkbox"/>	
	INTEREST ON LOANS \$ _____		<input type="checkbox"/>
	LAND TAX \$ _____	<input type="checkbox"/>	
	LEGAL FEES \$ _____	<input type="checkbox"/>	
	PEST CONTROL \$ _____	<input type="checkbox"/>	
	PROPERTY AGENTS FEES \$ _____		<input type="checkbox"/>
	STATIONERY, PHONE, POSTAGE \$ _____	<input type="checkbox"/>	
	REPAIRS & MAINTENANCE \$ _____	<input type="checkbox"/>	
	WATER CHARGES \$ _____	<input type="checkbox"/>	
	DEPRECIATION SCHEDULE FEE \$ _____		<input type="checkbox"/>
	_____ \$ _____		
	_____ \$ _____		
	_____ \$ _____		

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 22 - 30 JUN 23
- 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

Please tick box where a receipt or agent/loan statement has been provided.

****WARNING - All loan bank statements must be provided to your accountant. You should not redraw on your investment property loan/s for private use otherwise your interest claim will need to be apportioned****

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

BOOKKEEPING & PAYROLL

The Simple Solution

FINANCIAL PLANNING

Putting you first

MORTGAGE BROKING

Your Property Finance Solution

INSURANCE

Peace of Mind

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



Find us on [/insightaccounting](https://www.facebook.com/insightaccounting)

www.insightaccounting.com.au

<p>PAKENHAM SMALL BUSINESS CENTRE 1/35 Southeast Boulevard PAKENHAM VIC 3810 (03) 5941 1302</p>	<p>CRANBOURNE 117 High Street (Ground Floor) CRANBOURNE VIC 3977 (03) 5995 2700</p>	<p>BEACONSFIELD Shop 1, 6-10 Old Princes Hwy, BEACONSFIELD VIC 3807 (03) 9707 0555</p>	<p>WARRAGUL Shop 1C Warragul Shopping Plaza Corner Victoria & Smith Street, WARRAGUL VIC 3820 (03) 5622 1793</p>
---	---	--	---