

# Rental Property Information Checklist

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**Client Name:** \_\_\_\_\_

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This checklist is required if you operated a rental property during the year and you have not provided us with a reconciled cashbook, bank statements or accounting software system. Please complete one schedule for each property owned.

## 1. Property Address

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## 2. Rental Income

Rent received: \_\_\_\_\_

Period rented (if not full year): \_\_\_\_\_

## 3. Rental Expenses

Please provide us with details of expenses paid during the year relating to the rental property. Please provide us with copies of invoices where possible.

Advertising: \_\_\_\_\_

Body Corporate Levies: \_\_\_\_\_

Cleaning: \_\_\_\_\_

Insurance: \_\_\_\_\_

Interest: \_\_\_\_\_

Legal Fees: \_\_\_\_\_

Property Management Fees: \_\_\_\_\_

Rates: \_\_\_\_\_

Repairs and Maintenance: \_\_\_\_\_

Telephone: \_\_\_\_\_

Travel: \_\_\_\_\_

Valuation Fees: \_\_\_\_\_

Other (please detail) : \_\_\_\_\_

## 4. Loans and Mortgages

Please provide us with copies of all loan and mortgage statements for the year.

- 5. Property Purchase**
- If this is the first year of ownership, please provide us with copies of the sale and purchase agreement, settlement statement and any valuations obtained (as applicable).
- 6. Property Disposal**
- If you sold your rental property during the year, please provide us with copies of the sale and purchase agreement, settlement statement and any valuations obtained (as applicable).
- 7. Any other information you think may be relevant**