

## RENTAL PROPERTY CHECKLIST \_\_\_\_\_

Please use this list as a handy reminder of what will be useful to bring to your appointment.

Please Indicate whether information is applicable to client (please tick); Y = Yes OR N = No		Y or N	
Questions	What to bring		
Did you borrow for the property?	Loan bank statements showing interest and fees for full financial year	<input type="checkbox"/>	<input type="checkbox"/>
Did you do any renovations?	Summary of receipts showing amounts, brief description and dates for capital expenses	<input type="checkbox"/>	<input type="checkbox"/>
Did you do any repairs/cleaning /maintenance?	Summary of receipts and brief description for expenses for full financial year	<input type="checkbox"/>	<input type="checkbox"/>
Other costs?	• Commission statements from agent showing gross rent less deductions for expenses	<input type="checkbox"/>	<input type="checkbox"/>
	• Advertising for tenants	<input type="checkbox"/>	<input type="checkbox"/>
	• Body corporate fees and charges	<input type="checkbox"/>	<input type="checkbox"/>
	• Council rates, water charges and land tax	<input type="checkbox"/>	<input type="checkbox"/>
	• Electricity and gas	<input type="checkbox"/>	<input type="checkbox"/>
	• Gardening/lawn mowing	<input type="checkbox"/>	<input type="checkbox"/>
	• Insurance –building/contents/ public liability	<input type="checkbox"/>	<input type="checkbox"/>
	• Lease document preparation/registration/stamp duty	<input type="checkbox"/>	<input type="checkbox"/>
	• Pest control	<input type="checkbox"/>	<input type="checkbox"/>
	• Quantity surveyors fees	<input type="checkbox"/>	<input type="checkbox"/>
	• Secretarial and bookkeeping fees	<input type="checkbox"/>	<input type="checkbox"/>
	• Security patrol fees	<input type="checkbox"/>	<input type="checkbox"/>
	• Stationery and postage	<input type="checkbox"/>	<input type="checkbox"/>
	• Telephone calls and rental	<input type="checkbox"/>	<input type="checkbox"/>
• Travel and car expense for:	▪ Rent collection	<input type="checkbox"/>	<input type="checkbox"/>
	▪ Inspection and maintenance of property	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any depreciations schedules?	Depreciation schedule or Quantity Surveyor's Reports	<input type="checkbox"/>	<input type="checkbox"/>
Did you buy a rental property during the year?	Settlement statement from Conveyancer or evidence of purchase price, stamp duty and legal fees	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell a rental property during the year?	<b>Refer to Capital Gains Checklist</b>	<input type="checkbox"/>	<input type="checkbox"/>
New Property – Borrowing costs such as loan establishment fees are claimed over 5 years	Summary of borrowing costs paid to the lending bank for establishing the loan (Including any brokerage costs to 3 <sup>rd</sup> party facilitators).	<input type="checkbox"/>	<input type="checkbox"/>