



RENTAL PROPERTY TAX RETURN CHECKLIST

Please complete all items in the required field(s), save to your local drive and email the document(s) and any attachment(s) to our office.

CLIENT DETAILS

Income Year Ended: _____ Date Property was acquired: _____

Address of Property: _____
_____ Postcode: _____

Number of weeks property rented: _____

Date property first earned rental income: _____

Is this property registered for GST? Yes No

Provided	N/A
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If property was purchased in current financial year, please provide:

Copy of contract of sale (on purchase)

Copy of statement adjustments (if applicable)

Copy of conveyancing statement

If property was sold in the current financial year, please provide:

Copy of contract of sale

Copy of any legal fees incurred in sale of property

Copy of loan statement(s) confirming closure of account(s)

If property is managed by Estate Agents, please provide:

Annual Rental Property Statement from Estate Agent

Copy of all investment loan statement(s) for the income year

Copy of Property Tax Depreciation report (i.e. from BMT, Napier + Blakeley)

Summary of out of pocket rental expenses paid for, in addition to those included within



RENTAL PROPERTY TAX RETURN CHECKLIST CONTINUED

Please complete all items in the required field(s), save to your local drive and email the document(s) and any attachment(s) to our office.

If property is managed independently, please complete the following section

INCOME

Rental Income: \$ _____

Misc Income: \$ _____

EXPENSES

ADVERTISING FOR TENANTS	\$ _____
BODY CORPORATE FEES:	\$ _____
CLEANING:	\$ _____
COUNCIL RATES:	\$ _____
GARDENING / LAWN MOWING:	\$ _____
INSURANCE:	\$ _____
LEGAL FEES:	\$ _____
PEST CONTROL:	\$ _____
AGENTS FEES / COMMISSIONS:	\$ _____
REPAIRS & MAINTENANCE:	\$ _____
STATIONERY / TELEPHONE / POSTAGE:	\$ _____
WATER RATES:	\$ _____

OTHER EXPENSES

Enter description and costs below

DESCRIPTION	COSTS
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____