

## Tax essentials

### Investment property form

Questions	Reponses
Client (1) Name:	
Client (2) Name:	
Address of Rental Property:	
Please list owners and % of ownership	
1)	_____%
2)	_____%
3)	_____%
4)	_____%
Financial period that this form relates to:	01/07/_____ to 30/06/_____
Date property was purchased:	
Date property first earned rental income:	
Purchase price:	
Weeks available for rent:	
Weeks rented:	
Any private use this year? (yes or no)	
Has the loan for the property been renegotiated this year? (yes or no)	
Has the property been sold during the year? If yes please provide sale date and other relevant documents.	

Income and Expenses schedule	
<b>Income</b> (please complete details below)	
Gross rental Income	
Other Income	
<b>Expenses</b> (please complete details below)	
Advertising	
Body Corporate	
Borrowing Fees	
Cleaning	
Council Rates	
Gardening	
Insurance	
Loan Interest	
Land Tax	
Legal Fees	
Pest Control	
Property Agent Fees	
Repairs, maintenance	
Stationery/phone/postage	
Motor vehicle expenses	
Other travel expenses	
Water charges	
Sundry rental expenses	
Have you performed any renovations this year? If so, please provide details:	
<b>Please provide copies of the following:</b>	<b>Provided (yes or no)</b>
1) Bank loan statements	
2) Property management statement	
3) Depreciation schedule	
4) Purchase docs	