

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 \$ | |
| CITY STATE P/CODE | BANK FEES ON LOAN(S) \$ | |
| DATE FIRST EARNED RENTAL INCOME// | BODY CORPORATE FEES \$ | |
| NO. WEEKS RENTED OUT PRIVATE USE days used | BORROWING EXPENSES \$ | |
| | CLEANING EXPENSES \$ | |
| INCOME | COUNCIL RATES \$ | |
| GROSS RENT \$ OTHER RENTAL INCOME \$ | GARDENING / LAWN MOWING \$ | |
| | INSURANCE \$ | |
| CAPITAL PURCHASES | INTEREST ON LOANS \$ | |
| ASSET DATE/ | LAND TAX \$ | |
| ASSET DATE/ | LEGAL FEES \$ | |
| ASSET DATE/ | PEST CONTROL \$ | |
| ASSET DATE/ | PROPERTY AGENTS FEES \$ | |
| ASSET DATE/ | STATIONERY, PHONE, POSTAGE \$ | |
| | REPAIRS & MAINTENANCE \$ | |
| PLEASE PROVIDE THE FOLLOWING | WATER CHARGES \$ | |
| Real Estate Agent Annual Summary Statement | DEPRECIATION SCHEDULE FEE \$ | |
| Bank statements on Investment Loan(s) 1 JUL 22 - 30 JUL 23 | \$ | |
| Property Depreciation Schedule (i.e. BMT, Deppro etc.) | \$ | |
| Receipts/Invoices for any expenditure incurred in year | \$ | DI CLI I |
| ☐ IF NEW - All purchase documents, conveyancing etc. | | Please tick box where a receipt or agent/loan statement has been |
| ☐ IF SOLD - All sale documents, conveyancing, legal fees | | provided. |

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

BOOKKEEPING & PAYROLL

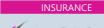


FINANCIAL PLANNING











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







www.insightaccounting.com.au

PAKENHAM SMALL BUSINESS CENTRE 1/35 Southeast Boulevard PAKENHAM VIC 3810 (03) 5941 1302

CRANBOURNE

117 High Street (Ground Floor) CRANBOURNE VIC 3977 (03) 5995 2700

BEACONSFIELD

Shop 1, 6-10 Old Princes Hwy, BEACONSFIELD VIC 3807 (03) 9707 0555

WARRAGUL

Shop 1C Warragul Shopping Plaza Corner Victoria & Smith Street, WARRAGUL VIC 3820 (03) 5622 1793