



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

ADDRESS _____

CITY _____ STATE _____ P/CODE _____

DATE FIRST EARNED RENTAL INCOME ____ / ____ / ____

NO. WEEKS RENTED OUT _____ PRIVATE USE _____ days used

INCOME

GROSS RENT \$ _____ OTHER RENTAL INCOME \$ _____

CAPITAL PURCHASES

ASSET _____ DATE ____ / ____ / ____

ASSET _____ DATE ____ / ____ / ____

ASSET _____ DATE ____ / ____ / ____

ASSET _____ DATE ____ / ____ / ____

ASSET _____ DATE ____ / ____ / ____

PLEASE PROVIDE THE FOLLOWING

- Real Estate Agent Annual Summary Statement
- Bank statements on Investment Loan(s) 1 JUL 22 - 30 JUN 23
- Property Depreciation Schedule (i.e. BMT, Deppro etc.)
- Receipts/Invoices for any expenditure incurred in year
- IF NEW** - All purchase documents, conveyancing etc.
- IF SOLD** - All sale documents, conveyancing, legal fees

EXPENDITURE

ADVERTISING FOR TENANTS \$ _____

BANK FEES ON LOAN(S) \$ _____

BODY CORPORATE FEES \$ _____

BORROWING EXPENSES \$ _____

CLEANING EXPENSES \$ _____

COUNCIL RATES \$ _____

GARDENING / LAWN MOWING \$ _____

INSURANCE \$ _____

INTEREST ON LOANS \$ _____

LAND TAX \$ _____

LEGAL FEES \$ _____

PEST CONTROL \$ _____

PROPERTY AGENTS FEES \$ _____

STATIONERY, PHONE, POSTAGE \$ _____

REPAIRS & MAINTENANCE \$ _____

WATER CHARGES \$ _____

DEPRECIATION SCHEDULE FEE \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

RECEIPT STATEMENT

Please tick box where a receipt or agent/loan statement has been provided.

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

BOOKKEEPING & PAYROLL



FINANCIAL PLANNING



MORTGAGE BROKING



INSURANCE



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



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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