



ACCOUNTING - BOOKKEEPING & PAYROLL - LENDING - FINANCIAL PLANNING - INSURANCE

2024 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 \$ _____	<input type="checkbox"/>	
CITY _____ STATE _____ P/CODE _____	BANK FEES ON LOAN(S) \$ _____		<input type="checkbox"/>
DATE FIRST EARNED RENTAL INCOME ____/____/____	BODY CORPORATE FEES \$ _____	<input type="checkbox"/>	
NO. WEEKS RENTED OUT _____ PRIVATE USE _____ days used	BORROWING EXPENSES \$ _____		<input type="checkbox"/>
	CLEANING EXPENSES \$ _____	<input type="checkbox"/>	
	COUNCIL RATES \$ _____	<input type="checkbox"/>	
	GARDENING / LAWN MOWING \$ _____	<input type="checkbox"/>	
	INSURANCE \$ _____	<input type="checkbox"/>	
	INTEREST ON LOANS \$ _____		<input type="checkbox"/>
	LAND TAX \$ _____	<input type="checkbox"/>	
	LEGAL FEES \$ _____	<input type="checkbox"/>	
	PEST CONTROL \$ _____	<input type="checkbox"/>	
	PROPERTY AGENTS FEES \$ _____		<input type="checkbox"/>
	STATIONERY, PHONE, POSTAGE \$ _____	<input type="checkbox"/>	
	REPAIRS & MAINTENANCE \$ _____	<input type="checkbox"/>	
	WATER CHARGES \$ _____	<input type="checkbox"/>	
	DEPRECIATION SCHEDULE FEE \$ _____		<input type="checkbox"/>
	_____ \$ _____		
	_____ \$ _____		
	_____ \$ _____		

INCOME
GROSS RENT \$ _____ OTHER RENTAL INCOME \$ _____

CAPITAL PURCHASES
ASSET _____ DATE ____/____/____
ASSET _____ DATE ____/____/____
ASSET _____ DATE ____/____/____
ASSET _____ DATE ____/____/____
ASSET _____ DATE ____/____/____

PLEASE PROVIDE THE FOLLOWING
<input type="checkbox"/> Real Estate Agent Annual Summary Statement
<input type="checkbox"/> Bank statements on Investment Loan(s) 1 JUL 23 - 30 JUN 24
<input type="checkbox"/> Property Depreciation Schedule (i.e. BMT, Deppro etc.)
<input type="checkbox"/> Receipts/Invoices for any expenditure incurred in year
<input type="checkbox"/> IF NEW - All purchase documents, conveyancing etc.
<input type="checkbox"/> IF SOLD - All sale documents, conveyancing, legal fees

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

****WARNING - All loan bank statements must be provided to your accountant. You should not redraw on your investment property loan/s for private use otherwise your interest claim will need to be apportioned****

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

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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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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