INSIGHT

ACCOUNTING - BOOKKEEPING & PAYROLL - LENDING - FINANCIAL PLANNING

2026 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 25 - 30 JUN 26**
- ☐ 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

		RECEIPT	STATEMENT
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	$ _____		☐
_____	$ _____		
_____	$ _____		
_____	$ _____		

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

BOOKKEEPING & PAYROLL

INSIGHT BOOKKEEPING & PAYROLL
The Simple Solution

FINANCIAL PLANNING

INSIGHT SUPER & RETIREMENT
Putting you first

MORTGAGE BROKING

INSIGHT LENDING
Your Property Finance Solution

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

xero PLATINUM PARTNER

CPA AUSTRALIA

Find us on /insightaccounting

www.insightaccounting.com.au

PAKENHAM
1/35 Southeast Boulevard
PAKENHAM VIC 3810
(03) 5940 4555

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