

PREPARATION CHECKLIST

Rental Property Information

To assist us in preparing your **2026 rental property** schedule, please use this checklist when you compile your information. Completing the checklist can take some time and effort, however your efforts will enable us to process your work more efficiently. This can lead to both time and cost savings as we will not need to come back to you with further requests for information, thus delaying the processing of your tax return.

Property Details		
Address		
Ownership	Name	%
	Name	%
	Name	%
	Name	%
Or Tenants in Common	&	

If the property is managed by a real estate agent, please attach the annual statement and include only any additional income and/or expenses not shown on the statement.

Income		
Number of weeks the property was rented this year	weeks	
Was the property available to rent the whole year?	Yes	No
	If no, how many weeks?	
Was the property rented or available to rent at 12 May, 2026?	Yes	No
Did you renegotiate your rental property loan during 2025/26?	Yes	No
Rental Income (Amount)	\$	
Other rental related income	\$	

Additional Expenses not included in property manager annual statement	Filed in Client Portal?
Advertising for tenants	
Body corporate fees	
Borrowing expenses	
Cleaning	
Council rates	
Gardening/lawn mowing	
Insurance	
Interest on loans (please include a copy of the loan statements for the full year or a summary generated by the bank.)	
Land tax	
Legal fees	
Pest control	
Property agent fees/commission	
Repairs and maintenance (if any invoice is more than \$300, please provide a copy)	
Stationary	
Telephone	
Postage	
Water Charges	
Sundry rental expenses	
1. Electricity/Gas	
2. Bank charges	
3.	

If you have obtained a quantity surveyor's report (depreciation report) please provide a copy of the report to us. If you have purchased a new rental property, please provide us with a copy of the purchase contract and settlement statement. If you have sold a rental property, please provide us with a copy of the contract of sale and settlement statement.