

2024 Rental Checklist

Client Name: _____

Address of Property: _____

Purchase Date: _____ **Sold Date:** _____

If the property was purchased or sold in this year, please also provide:

- Copy of solicitors' settlement statement with purchase/sale details.
- If purchased, a list of chattels acquired with the property, and their approximate values.

RENTAL INCOME \$ _____ per week x _____ weeks = _____

 \$ _____ per week x _____ weeks = _____

TOTAL FOR YEAR \$ _____

If the property was **NOT** rented for a full 12 months, please provide details of why it was vacant.

EXPENSES – please include all receipts & workings

- | | | |
|---|------------------|-----------|
| 1. Accounting Fees | | \$ _____ |
| 2. Advertising (to rent) | | \$ _____ |
| 3. Bank Charges (including loan application fees) | | \$ _____ |
| 4. Body Corp Fees | | \$ _____ |
| 5. Insurance | | \$ _____ |
| 6. Land Lease | | \$ _____ |
| 7. Legal Expenses – attach details | | \$ _____ |
| 8. Mortgage Interest (excluding principal portion) | | \$ _____ |
| 9. Mileage claim (kilometres travelled for inspections/property business) | | _____ kms |
| 10. Power (if landlord pays power) | | \$ _____ |
| 11. Property Management Fees (please provide annual summary) | | \$ _____ |
| 12. Rates | - City Council | \$ _____ |
| | - Regional Rates | \$ _____ |
| | - Water Rates | \$ _____ |
| 13. Repairs & Maintenance (provide details on reverse) | | \$ _____ |
| 14. Sundry Expenses e.g. Valuation/Asset Purchases/General (provide details on reverse) | | |

Please note rental loss ring-fencing rules apply to residential properties from 2020 tax year.