



Step 1

Please forward your Annual Rental Statement from your Managing Agent or complete the table if you self manage

If you forward us your Real Estate Agents Annual Rental Statement, you only need to complete below what is not listed on the Agents Statement (i.e what you pay for out of pocket, such as bank loans). We have highlighted the common expenses reported by Agents in yellow

	Property 1	Property 2	Property 3	Notes or Queries
Ownership %				
Address				
First Rental Start date				
Rental Income				
Other				
Total Income				

Expenses				
Interest Paid on Mortgage				
Advertising for Tenants				
Letting Fees				
Council Rates				
Water Rates				
Strata Levies				
Insurance Premiums				
Bank Charges				
Advertising				
Cleaning				
Agents Commission				
GST on Agents Commission				
Gardening/Lawn Maintenance				
Repairs and Maintenance				
1 -				
2 -				
3 -				
4 -				
Land Tax Paid				
Legal Fees				
Capital improvements ***				
1 -				
2 -				
3 -				
Other				
Total Expenses				

Additional Questions re your Rental Property

1 - If you made capital expenditure this year to improve the property, please provide copies of all invoices over \$1,000 to claim/assess repair/capital nature and provide the total amount of expenditure

2 - Do you have a depreciation schedule prepared by a quantity surveyor for these properties?
If not, would you like further information on the benefits to you of ordering a schedule?

☐ Yes ☐ No

☐ Yes ☐ No

3 - Is your property or properties registered for land tax?
Please provide most recent land tax assessment

☐ Yes ☐ No

4 - Did you refinance during the year?

☐ Yes ☐ No

If yes, please remember we need the interest from both loans. Please request these from your previous lender!