



Rental Property (with Capital Gain Worksheet if Needed)

Property Information	
Owner name (ownership %)	
Property Address	
Purchase Date	
Purchase Price	

Please provide a copy of the Property Agent's statement for the financial year. Please also provide the following details:

Income	
Date Property First Earned Rent:	
Number of Weeks Property Rented This Year:	
Rental Income:	
Other Rental Income:	

Expenses			
Item	\$	Item	\$
Advertising for tenants		Property Agent Fees/Commission	
Body Corporate		Repairs & Maintenance	
Borrowing Expenses		Stationery, Telephone & Postage	
Cleaning		Travel Expenses	
Council Rates		Water Charges	
Gardening/Lawn Mowing		Sundry Expenses	
Insurance		Other (list.....)	
Interest on Loans		Bank fees	
Land Tax		Quantity Surveyor Fees	
Legal Fees		
Pest Control		

Capital Gain Worksheet

If you have sold your investment property, please provide a copy of:

- Contract of Purchase and Contract of Sale
- Solicitor/ conveyancer settlement statement
- A quantity surveyors report and your prior year's tax return in order to ensure we pick up all depreciation items for the property.

Capital Gain	
Contract purchase price of property	
Stamp Duty or Other Similar Duty paid on purchase	
Contract Date for Sale (not the settlement date)	
Sale price per contract	
Capital Expenditure to Increase Property Value (extensions, garages etc)	
Remuneration for the Services of a Surveyor, Valuer, Auctioneer, Broker, Agent, Consultant or Legal Advisor for Purchase and for Sale	
Costs of Property Transfer	
Costs of Advertising or Marketing to find a Seller or Buyer	
Search Fees Relating to the Purchase and sale of the property	
Cost of Conveyancing on purchase and sale of property	
Borrowing Expenses	
Any Depreciation (per previous tax returns, if any) Claimed	
Did you live in your investment property at any stage? (y/n)	