A blue and green logo

Description automatically generated

**Investment Property Checklist**

Your Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PROPERTY 1**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If property was sold during the year, date of sale: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of weeks property was rented this year: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PROPERTY 2**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If property was sold during the year, date of sale: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of weeks property was rented this year: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PROPERTY 3**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If property was sold during the year, date of sale: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of weeks property was rented this year: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| SHARED OWNERSHIP | | | |
| Where ownership of the property is shared, please advise the entitlement: | | | |
| Name: | % | Name: | % |

*Please provide evidence to substantiate below income & expenses including your end of*

*financial year statement from your real estate & bank statement detailing interest on loan.*

|  |  |  |  |
| --- | --- | --- | --- |
| INCOME | | | |
|  | PROPERTY 1 | PROPERTY 2 | PROPERTY 3 |
| Rental Income |  |  |  |
| Insurance Recoveries |  |  |  |
| Other Rental Related Income |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| EXPENSES | | | |
|  | PROPERTY 1 | PROPERTY 2 | PROPERTY 3 |
| Advertising |  |  |  |
| Bank Charges |  |  |  |
| Body Corporate Fees |  |  |  |
| Building Write Off (Quantity Surveyors Report) |  |  |  |
| Cleaning |  |  |  |
| Council Rates |  |  |  |
| Gardening / Lawn Mowing |  |  |  |
| Insurance |  |  |  |
| Interest on Loans |  |  |  |
| Legal Expenses |  |  |  |
| Loan Fees |  |  |  |
| Pest Control |  |  |  |
| Property Agent Fees/Commission |  |  |  |
| Quantity Surveyor Fees |  |  |  |
| Repairs & Maintenance \*\* |  |  |  |
| Stationery, Telephone & Postage |  |  |  |
| Water Charges |  |  |  |
| Smoke Alarm Annual Expense |  |  |  |
| Sundry Expenses (Provide Details) |  |  |  |
|  |  |  |  |
|  |  |  |  |

\*\* Please provide receipts & details below

|  |  |  |  |
| --- | --- | --- | --- |
| REPAIRS & MAINTENANCE SCHEDULE – ITEMS OVER $300 | | | |
| Date | Property (1, 2 or 3) | Item | Amount (inc. GST) |
|  |  |  |  |
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| --- |
| SALE OF INVESTMENT PROPERTY |
| If you sold your investment property during the financial year, please also include the below information for CGT calculation purposes:   * Sale documents from conveyancer including contract & settlement statement * Property purchase documents including settlement statement * Stamp duty paid on purchase * Real estate’s advertising fees & commission paid on sale * Legal fees paid on sale * Any other documents relating to the purchase or sale of property |