**ADDITIONAL RENTAL PROPERTY INFORMATION** *Please complete one of these schedules per Property.*

**Property Details**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ADDRESS OF RENTAL PROPERTY** | |  | | | |
| **DATE PURCHASED** |  | | **DATE RENTAL INCOME FIRST EARNT** | |  |
| **NO. WEEKS AVAILABLE FOR RENT** *(this year)* | | |  | **DATE BUILT** |  |
| **OWNERSHIP DETAILS** | | In your name  In joint names *(please provide details)* | | | |
| **IS THIS PROPERTY LEASED AT MARKET RENT?** | | Y  N *(please provide details of who this is leased to)* | | | |

*For new clients please provide the purchase settlement statement and other purchase costs, e.g., stamp duty, legal fees, renovations or initial repairs, and any loan application fees and/or mortgage discharge expenses when you reach the end of the form.*

*Please also provide your mortgage statements.*

**Income**

|  |  |
| --- | --- |
| GROSS RENT | OTHER RENTAL INCOME |
| $ | $ |

**Expenses**

|  |  |  |  |
| --- | --- | --- | --- |
| EXPENSE TYPE | AMOUNT | EXPENSE TYPE | AMOUNT |
| Advertising for Tenants | $ | Stationery, Phone & Postage | $ |
| Borrowing Expenses | $ | Cleaning | $ |
| Council Rates | $ | Gardening / Lawn Mowing | $ |
| Insurance | $ | Interest on Loan # 1 | $ |
| Land Tax | $ | Interest on Loan # 2 | $ |
| Pest Control | $ | Legal Fees | $ |
| Repairs & Maintenance | $ | Property Management Fees | $ |
| Body Corporate Fees | $ | Agents’ Commissions | $ |
| Water Charges | $ | Other Expenses | $ |

**Depreciable Items\*** *(please Iist any item(s) purchased costing more than $300 individually).*

| ITEM | DATE PURCHASED | COST |
| --- | --- | --- |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |

**Improvements / Construction Costs** *(Please provide a copy of your tax depreciation schedule if we do not have one on file)*

| ITEM | DATE | COST |
| --- | --- | --- |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |

|  |
| --- |
| **OTHER INFORMATION** *(Please list any other information that you believe may assist us in preparing your income tax return)* |
|  |
|  |
|  |
|  |
|  |

**SUPPORTING DOCUMENT CHECKLIST**

£ Income Statement from your myGov Account / Payment Summaries

£ Detailed Work Expenses Listing

£ Private Health Statement (Optional)

£ Unit Trust Tax Year Summary

£ New Motor Vehicle Hire Purchase / Lease / Chattel Mortgage Agreement / Interest Amortisation schedule

£ Rental Property Purchase Settlement Statement / Costs (if we do not have these)

£ Rental Property Depreciation Schedule (as prepared by Third Party)

£ Letter noting tax deductibility of Income Protection Premiums

£ Confirmation letter from your superannuation fund noting intent to claim tax deduction for contributions

£ Copy of your last tax return (if you are a new client)

Please complete the Authorisation below as this allows us to contact necessary organisations, (e.g., your bank or insurance company) to obtain information that is required to complete your Financial Statements and/or Tax Return.

**AUTHORISATION (please tick the following boxes if you agree)**

I authorise Canberra Tax Solutions to complete the compilation of Tax Return for myself for the 2025 financial year. I understand that a compilation is limited to the collection, classification and summarisation of financial information supplied by me and does not involve the verification of that information.

I do not require Canberra Tax Solutions to carry out an audit or a review assignment on the information provided.

I authorise Canberra Tax Solutions to obtain whatever information is required from third parties complete the preparation of my Tax Return.