

Property Investor Tax Time Checklist

Don't miss out on any deductions this tax time and maximise your cash flow

Please provide the documentation listed below if these are NOT SHOWN on your Real Estate Agent's Annual Tax Statement



New Clients Only (if applicable)

- ☐ Detailed copy of your last tax return
- ☐ Tax Invoice from previous accountant
- ☐ Copy of depreciation schedule
- ☐ Depreciation schedule tax invoice

History of Property (provide details)

- ☐ I have just purchased this property
- ☐ This is an existing rental property
- ☐ This is a holiday house
- ☐ This is an Airbnb/Stayz/short term rental
- ☐ This was my main residence last year

For New Property Purchases

- ☐ Copy of the Settlement Statement
- ☐ Copy of conveyancers' tax invoice
- ☐ Details of stamp duty/exemptions
- ☐ All loan statements from drawdown

Initial Costs (if applicable)

- ☐ Costs of cleaning property before leasing
- ☐ Costs of repairing initial damage

Property Management

- ☐ I use an agent to manage this property
- ☐ I manage this property myself

Property Income

- ☐ Agent's annual tax statement
- ☐ Any Other Income – payouts, interest, etc.

Admin Expenses

- ☐ Advertising Costs
- ☐ Stationery

Any questions?

Don't hesitate to contact us on 0431 259 476.

Property Management Expenses

- ☐ Agents' annual tax statement

Insurances

- ☐ Landlord premiums
- ☐ Building/Contents premiums
- ☐ Public liability premiums

Bank Charges

- ☐ Interest repayments
- ☐ Bank fees

Taxes and charges

- ☐ Council rates
- ☐ Water and sewerage charges
- ☐ Land tax
- ☐ Body corporate/strata fees

Cleaning

- ☐ Tax invoices for any expenses

Pest Control

- ☐ Tax invoices for any expenses

Gardening

- ☐ Tax invoices for these expenses

Repairs and maintenance

- ☐ Tax invoices for all replacements over \$300
- ☐ Tax invoices for all servicing costs over \$300

Capital improvements & replacements

- ☐ Tax invoices for any of these expenses

Other charges

- ☐ Tax invoices for electricity
- ☐ Tax invoices for gas
- ☐ Tax invoices for internet

All supporting documents can be sent to us using our secure client portal.

Please let us know if you require portal access.