Rental Property Holder Checklist

TI A
TAX INVEST ACCOUNTING

We have created a checklist to help Rental Holders gather all the information required to complete their tax return as efficiently as possible.

This will allow you to help speed up the process from the initial 10 minute Start My Work conversation, to booking your finalisation appointment.

RENTAL PROPERTY INFORMATION

- ○ Complete the following checklist - Rental Checklist
- ○ Contract Settlement Statement for purchase of property
  (Regardless of when the property was purchased, we are now requiring this for ensuring correct records due to CGT changes starting FY27)

RENTAL PROPERTY INCOME:

- ○ Property managers EOY report/ or bank statements if self managed

RENTAL EXPENSES:

- ○ Body Corp *(if applicable)*
- ○ Insurance
- ○ Council Rates
- ○ Water Rates
- ○ Land Tax *(if applicable)*
- ○ Interest On Loans
  - All loans associated with the property require full annual statements. Not just an end of year figure.
- ○ Refinanced Loans
  - Please note that if your loan has been refinanced, we require documentation of old and new loans.
- ○ Repairs & Maintenance
- ○ *- Copy of all invoices required - including invoices paid by property manager*
- ○ Quantity Surveyor Depreciation Report *(if applicable)*
- ○ Borrowing Costs *(This will include refinancing fees & LMI)*

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ADDITIONAL EXPENSES YOU MAY HAVE PAID YOURSELF INCLUDING

- ○ Cleaning
- ○ Gardening / Lawns
- ○ Pest Control
- ○ Smoke Alarms

NEW CLIENTS

- ○ Provide a copy of last years Tax Return - (Not just a copy of the NOA)

IF YOUR PROPERTY WAS SOLD

- ○ Sale Contract
- ○ Sale Settlement Statement
- ○ Legal Costs
- ○ Marketing & Staging Costs
- ○ Real Estate Commissions Paid

INCOME INFORMATION REQUIRED

- ○ Please complete the checklist that applies to your income status
- ○ Employment Income Only : PAYG Checklist
- ○ ABN Income : ABN Checklist
- ○ Provide any documents/receipts related to items included in the checklist.

Phone: 1300 487 589   www.taxinvestaccounting.com.au

Individual Tax Return Checklist

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HOW WE CAN HELP

Lodging a tax return shouldn’t feel like a guessing game.

As an individual, you might think your tax return is simple, but even basic returns can hide valuable opportunities to save.

Whether you're employed, changing jobs, studying, or managing multiple income streams, Tax Invest Accounting ensures that every deduction is captured and your return is optimised.

We take the time to understand your situation and find the best outcome for you, while making the whole process smooth and stress-free. Don’t settle for a generic solution, get personalised service that puts money back in your pocket.

BOOKING PROCESS

At the time of booking you will be asked basic questions to keep the booking system easy and convenient for you. We do strongly recommend you take the time to complete the additional Voluntary Checklist at the time of booking to maximise your Tax Return & get the most out of the appointment with your accountant.

PLAN SMARTER FOR NEXT YEAR

We encourage our individual clients to ask questions and be proactive. Small decisions throughout the year can make a big difference at tax time.

ENQUIRE:

We have an experience team ready to take your call or email if you have any questions regarding coming on board. Alternatively, you can book direct through our website anytime.

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