

INVESTMENT PROPERTY CHECKLIST 2024

Property Information

Property address

Owner name	TFN	Ownership %

Date of acquisition	
Date income first produced	
No. weeks rented in 2023/2024 year	weeks
Personal use this year	%

Cost Base information

- If this is the first year we are preparing your return, please complete all fields.
- If we have prepared your return previously, include only additional costs incurred in the current year.

Costs	Amount (\$)
Cost of property	
Valuation fees	
Professional fees	
Transfer costs	
Stamp duty	
Legal fees	
Non capital costs – where no deduction has been allowed	
Improvements	
Initial repairs	

Income

Only complete if not rented through an agent or there is income not shown on your agent statement.

Expenses	Amount (\$)	Notes
Rental income		
Other income		
Total income		

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Expenses

Exclude any items which have been included on your real estate agent's statement.

Expenses	Amount (\$)	Notes
Advertising for tenants		
Bank Charges		
Borrowing expenses (incl Mortgage insurance)		
Cleaning		
Depreciation		
Electricity & gas		
Gardening & lawn mowing		
Insurance		
Interest on loans		
Land tax		
Lease costs		
Legal and accounting		
Management/agent fees		
Office supplies		
Pest control		
Repairs (provide detail)		
Repairs (provide detail)		
Repairs (provide detail)		
Strata / body corporate fees		
Telephone		
Rates – council		
Rates – water		
Others – please specify		Example: cost of depreciation schedule
Total expenses		

Assets

New assets purchased during the year (eg. Furniture, hot water system, new stove). Please include the following information in Note –

- date of purchase
- if it is a second-hand asset or asset previously used for private purposes

Asset	Amount (\$)	Notes

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