

## INVESTMENT PROPERTY CHECKLIST 2025

### Property Information

Property address

Owner name	TFN	Ownership %

Date of acquisition	
Date income first produced	
No. weeks rented in 2024/2025 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		
<b>Total income</b>		

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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
<b>Total expenses</b>		

## 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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