



2021 Rental Property Checklist

(A separate form must be completed for EACH rental property owned)

Full address of rental: _____

Full name of owner/s: _____

• **WAS THIS RENTAL PURCHASED BETWEEN 1 JULY 2020 TO 30 JUNE 2021?**

- NO. Go to next question
 YES. If yes, please provide:

Loan contract (if applicable)

• **IS THIS THE FIRST YEAR BAGGETTA & CO IS PREPARING THE RENTAL SCHEDULE?**

- NO. Go to next question
 YES. If yes, please provide:

- FINAL PURCHASE settlement statement
 Certificate of title if NOT jointly owned in equal proportions
 Date rental was first available for rent: ___/___/___
 Quantity surveyor's report/depreciation report (if applicable)

• **IS THERE ANY PRIVATE USE OF THE RENTAL?**

- NO. Go to next question
 YES. If yes, private use % _____

• **DID YOU REFINANCE THE INVESTMENT LOAN/S BETWEEN 1 JULY 2020 TO 30 JUNE 2021?**

- NO. Go to next question
 YES. If yes, please provide:

Loan contract

• **DID YOU SELL THE RENTAL BETWEEN 1 JULY 2020 TO 30 JUNE 2021?**

- NO. Go to page 2
 YES. If yes, please provide:

FINAL SALE settlement statement

• **WOULD YOU LIKE TO REVIEW YOUR INVESTMENT LOAN?**

- NO.
 YES

• **WAS THE PROPERTY MANAGED BY A REAL ESTATE AGENT?**

NO. If no, please provide the following information along with supporting documentation:

- Total rental income received between 1 July 2020 to 30 June 2021
- Other rental related income (if any)
- Loan account statements covering 1 July 2020 to 30 June 2021
- Invoices/receipts for expenses:

(please tick and provide supporting documents for expenses that are applicable only)

- Assets purchased
- Cleaning
- Council rates
- Gardening
- Insurance (eg. Landlord, Building)
- Land tax
- Legal fees
- Pest control
- Repairs and maintenance
- Stationery and/or postage
- Strata levy
- Phone
- Water charges
- Other expenses not included above

YES. If yes, please provide:

- Annual rental summary statement, and/or
 - Monthly rental summary statements for the financial year
 - Loan account statements covering 1 July 2020 to 30 June 2021
 - Invoices/receipts for expenses NOT on rental summary statements:
- (please tick and provide supporting documents for expenses that are applicable only)*

- Assets purchased
- Cleaning
- Council rates
- Gardening
- Insurance (eg. Landlord, Building)
- Land tax
- Legal fees
- Pest control
- Repairs and maintenance
- Stationery and/or postage
- Strata levy
- Phone
- Water charges
- Other expenses not included above

(Continued over the page)

I confirm that the above information is correct to the best of my knowledge and that where necessary I hold documentary evidence in support of my claims.

Dated the day of 20.....

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Signature of Taxpayer

.....
Name (print)