

# 2019 Investment Property

## QUESTIONNAIRE



Note: If more than one property, please copy this schedule and provide details separately.

Be sure to save your information as you complete the form.

### PROPERTY ADDRESS:

Date of Acquisition:                    /            /

If you have not previously done so, please provide the following details regarding the property:

Settlement Statement and Statement of Adjustments – Received from solicitor at settlement.

Distribution Statement – Received from Bank at settlement. These items will contain deductions available to you annually for up to 5 years. They also hold information important for minimising any eventual Capital Gains.

### INCOME:

Rental Income	Please Provide annual rental summary	\$
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### DEDUCTIONS:

Agent Fees/Commission	See Annual Summary	\$
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Body Corporate	See Statements	\$
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Connection Fees	Gas, electricity, phone or water	\$
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Council Rates	See Rates Notices	\$
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Depreciation	See Depreciation Schedule	\$
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Building Writing Off	Capital Allowances	\$
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Depreciation Expenses	Capital Work Deductions	\$
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#### Insurance

Landlord		\$
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Building		\$
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Investment Loans	See also below	
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Interest	See Loan Statements	\$
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Bank Fees		\$
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Borrowing Costs		\$
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Land Tax		\$
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Repairs & Maintenance		\$
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Water Rates	See Quarterly Notices	\$
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Other    Please Specified Below

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\* This is a general questionnaire to commence your rental return, more information may be required if you have other income sources.

\* Please note that you need to retain any receipts for deductions that you have claimed.

\* Please feel free to list any other income/deductions not covered or that you are unsure about in the e-mail.