

2021 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	\$
Body Corporate	See Statements	\$
Connection Fees	Gas, electricity, phone or water	\$
Council Rates	See Rates Notices	\$
Depreciation	See Depreciation Schedule	\$
Building Writing Off	Capital Allowances	\$
Depreciation Expenses	Capital Work Deductions	\$
Insurance		
Landlord		\$
Building		\$
Investment Loans	See also below	
Interest	See Loan Statements	\$
Bank Fees		\$
Borrowing Costs		\$
Land Tax		\$
Repairs & Maintenance		\$
Water Rates	See Quarterly Notices	\$

Other Please Specified Below

\$
\$
\$
\$
\$

* 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.