

Investment Property

TAX RETURN QUESTIONNAIRE



Property Details

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

Property Address:

Purchase Date:

Purchase Price:

Date Property was first rented:

No. of weeks rented this financial year:

Income:

Rental Income \$

Deductions:

Body Corporate \$

Council Rates \$

Depreciation *Please provide a copy of your depreciation report*

Insurance

Building \$

Landlord \$

Investment Loans

Loan Interest *Please provide copies of statements* \$

Bank Fees \$

Water Rates \$

Repairs & Maintenance *Please list items separately*

\$

\$

\$

\$

Other *Please specify below e.g. Land Tax. Pest Control*

\$

\$

\$

\$

Note: If you have not previously done so, please provide the following documents for the property:

- Settlement Statement - Received from Solicitor at settlement
- Distribution Statement - Received from Bank at settlement

These documents can have important details and help minimise any eventual capital gains.

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

* Please note that you must retain any receipts for deductions that you have claimed.

* Please list any other income/deductions not covered by this questionnaire in the e-mail.