

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:

Have you attached a copy of your rental agent summary? Yes No

NOTE: Only fill in the following fields that don't appear on your rental agent summary.

Deductions:

Body Corporate	\$
Council Rates	\$
Depreciation <i>Please provide a copy of your depreciation report</i>	
Insurance	
Building	\$
Landlord	\$
Investment Loans	
Loan Interest <i>Please provide copies of statements</i>	\$
Bank Fees	\$
Water Rates	\$
Repairs & Maintenance <i>Please list items separately</i>	\$
	\$
	\$
	\$
	\$
Other <i>Please specify below e.g. Land Tax. Pest Control</i>	\$
	\$
	\$
	\$

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.