

Investment Property Address: _____

Your share of ownership: _____%

Newly acquired property

	Attached	N/A		
Settlement statement	<input type="checkbox"/>	<input type="checkbox"/>		
Date when property was purchased			Exchange: _____ / _____ / _____	Settlement: _____ / _____ / _____
Ownership split per Land Title documents	<input type="checkbox"/>	<input type="checkbox"/>		
Date property first became available for rent			Date: _____ / _____ / _____	
Details of stamp duty incurred	<input type="checkbox"/>	<input type="checkbox"/>		
Mortgage insurance details	<input type="checkbox"/>	<input type="checkbox"/>		
Details of improvements prior to renting (if any)	<input type="checkbox"/>	<input type="checkbox"/>		

Disposed property

	Attached	N/A		
Date when property was sold			Exchange: _____ / _____ / _____	Settlement: _____ / _____ / _____
Cost base information	<input type="checkbox"/>	<input type="checkbox"/>		
Legal costs information	<input type="checkbox"/>	<input type="checkbox"/>		
Real estate agent costs	<input type="checkbox"/>	<input type="checkbox"/>		
Details of private use during period of ownership	<input type="checkbox"/>	<input type="checkbox"/>		

Useful information

	Attached	N/A	
Annual statement from property agent	<input type="checkbox"/>	<input type="checkbox"/>	
Loan statements showing interest paid for the year	<input type="checkbox"/>	<input type="checkbox"/>	
Expenses incurred such as water charges, land tax and insurance premiums that aren't usually on property management report	<input type="checkbox"/>	<input type="checkbox"/>	_____ _____ _____
Details of depreciable assets bought or disposed of during the year	<input type="checkbox"/>	<input type="checkbox"/>	
Quantity surveyors report	<input type="checkbox"/>	<input type="checkbox"/>	
Details of private use for the year	<input type="checkbox"/>	<input type="checkbox"/>	_____ Days

Information check

	Included	
Rental income	<input type="checkbox"/>	\$ _____
Rental bond retained	<input type="checkbox"/>	\$ _____
Other Income	<input type="checkbox"/>	\$ _____
Advertising cost	<input type="checkbox"/>	\$ _____
Body corporate fees	<input type="checkbox"/>	\$ _____
Cleaning	<input type="checkbox"/>	\$ _____
Rates	<input type="checkbox"/>	\$ _____
Depreciation details	<input type="checkbox"/>	\$ _____
Gardening	<input type="checkbox"/>	\$ _____
Insurance	<input type="checkbox"/>	\$ _____
Interest paid	<input type="checkbox"/>	\$ _____
Land tax	<input type="checkbox"/>	\$ _____
Legal fees	<input type="checkbox"/>	\$ _____
Pest control	<input type="checkbox"/>	\$ _____
Property agent fees	<input type="checkbox"/>	\$ _____
Repairs and maintenance costs	<input type="checkbox"/>	\$ _____
Capital works	<input type="checkbox"/>	\$ _____
Stationery, postage etc.	<input type="checkbox"/>	\$ _____
Water charges	<input type="checkbox"/>	\$ _____

Notes: _____
