

Investment property checklist



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"/>	
Dates property first became available for rent			____ / ____ / ____
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

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

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: _____

