

## RENTAL PROPERTY TAX RETURN CHECKLIST

Please complete all items in the required field(s), save to your local drive and email the document(s) and any attachment(s) to our office.

### CLIENT DETAILS

Income Year Ended: \_\_\_\_\_ Date Property was acquired: \_\_\_\_\_

Address of Property: \_\_\_\_\_

\_\_\_\_\_  
Postcode: \_\_\_\_\_

Number of weeks property rented: \_\_\_\_\_

Date property first earned rental income: \_\_\_\_\_

Is this property registered for GST?                      Yes                      No

Provided

N/A

**If property was purchased in current financial year, please provide:**

Copy of contract of sale (on purchase)

Copy of statement adjustments (if applicable)

Copy of conveyancing statement

**If property was sold in the current financial year, please provide:**

Copy of contract of sale

Copy of any legal fees incurred in sale of property

Copy of loan statement(s) confirming closure of account(s)

**If property is managed by Estate Agents, please provide:**

Annual Rental Property Statement from Estate Agent

Copy of all investment loan statement(s) for the income year

Copy of Property Tax Depreciation report (i.e. from BMT, Napier + Blakeley)

Summary of out of pocket rental expenses paid for, in addition to those included within



