

**RENTAL PROPERTIES:** Please provide the real estate agent's Rental Property Annual Statement.

Address: \_\_\_\_\_

What dates was the property available to rent from: \_\_\_\_/\_\_\_\_/\_\_\_\_ to: \_\_\_\_/\_\_\_\_/\_\_\_\_ or for the ☐ full year.

**1. Income:**

Rent: \$ \_\_\_\_\_  
Water Reimbursed: \$ \_\_\_\_\_

Insurance Claim: \$ \_\_\_\_\_  
Other Income: \$ \_\_\_\_\_

**Rental Property Expenses:**

Advertising for Tenants: \$ \_\_\_\_\_  
Body Corporate Levies: \$ \_\_\_\_\_  
Gardening/Lawn Mowing: \$ \_\_\_\_\_  
Insurance: Building & Contents: \$ \_\_\_\_\_  
Insurance: Landlords: \$ \_\_\_\_\_  
Water Rates: \$ \_\_\_\_\_  
Water Consumption: \$ \_\_\_\_\_  
Interest (provide bank interest summary): \$ \_\_\_\_\_

Property Agent Fees: \$ \_\_\_\_\_  
Cleaning: \$ \_\_\_\_\_  
Council Rates: \$ \_\_\_\_\_  
Pest Control: \$ \_\_\_\_\_  
Land Tax: \$ \_\_\_\_\_  
Electricity/Gas: \$ \_\_\_\_\_  
Printing & Stationery: \$ \_\_\_\_\_  
Bank Fees: \$ \_\_\_\_\_

**Repairs, Maintenance & New Assets**

|                      |          |                    |
|----------------------|----------|--------------------|
| Date: ____/____/____ | \$ _____ | Description: _____ |
| Date: ____/____/____ | \$ _____ | Description: _____ |
| Date: ____/____/____ | \$ _____ | Description: _____ |
| Date: ____/____/____ | \$ _____ | Description: _____ |
| Date: ____/____/____ | \$ _____ | Description: _____ |

**2. Have you refinanced or drawn down on your investment loan?** Yes ☐ / No ☐

If yes: Please provide all loan statements from 1/07/2024 to 30/06/2025.

**3. New Rental Property:** If this is the first year you have owned or rented your property please provide:

- A copy of your "Final Settlement" purchase statement & "Offer & Acceptance".
- Initial loan statement.
- The depreciation report.
- Is the property jointly owned? Yes ☐ / No ☐ If yes, what \_\_\_\_% is yours?
- Is 100% of this loan for this property? Yes ☐ / No ☐ If no, what \_\_\_\_% is private?

Mortgage Lenders Insurance: \$ \_\_\_\_\_

Borrowing Expenses: \$ \_\_\_\_\_

Pest Control Check: \$ \_\_\_\_\_

Depreciation Report: \$ \_\_\_\_\_

**WARNING:** Please note that all claims need to have evidence kept for 5 years from lodgement date in order to avoid any audit complications. The information & figures that you have provided to us on this form are being accepted as you have sufficient evidence to substantiate the claim. If you are unsure if you can claim an expense, please contact us.