

Accountant & Registered Tax Agent

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The following is a list of Rental Property Information to bring to your tax appointment:

1. If the property is rented through a property agent you normally receive monthly statements. Make sure you have **all 12 statements** if the property was rented out for a full year, **or an annual summary from an agent.**
2. Receipts or invoices for repairs or expenses under \$300 that were performed on the property (gardening, painting, plumbing etc.)
3. Shire Rate Notice/s
4. Land Tax Notice/s
5. Water Rate Notice/s
6. Insurance Policies (building insurance, tenant insurance etc.)
7. Bank Loan Statements or Loan Interest for the year
8. If it is a new loan this year or your first rental property, the original loan documents will be required to establish the borrowing expense deduction.
9. Strata Levies, if any within a strata complex
10. Cost of any improvements and renovations to the property
11. Details of travel (motor vehicle or other) to the rental property for inspection, rent collection or to perform repairs.
12. Details of any new carpets, new curtains, new hot water system or any other major replacement.
13. If this is the first time you have rented your property you will need a copy of a **depreciation report** from a licensed valuer for depreciation on plant & the building. Companies such as Depex, Depwest or Deppro are able to provide this if unsure.
14. The cost of advertising your property.
15. If the property was purchased in the financial year we'll need the property settlement statement and purchase contract details (real estate offer/ acceptance).

If you're unsure of other costs you've incurred or any further information bring it to your appointment and we can talk it through.

Thanks!