

Rental Property Tax Return - Year End Questionnaire 2023

To assist us in preparing your rental property tax schedules, please use this questionnaire as a checklist when you compile your information.

With respect to your rental income, please keep in mind that the Australian Taxation Office (ATO) has the ability to check your return income against independent sources. For deductions, keep in mind that self-assessment applies. In the event of an ATO audit, you will need to be able to substantiate the deductions claimed.

Thank you for completing this questionnaire. Completing it takes considerable time and effort however your efforts will enable us to process your work quickly and efficiently because we will have all the necessary information at hand to complete the work. This will also maximise deductions and avoid unnecessary costs, as we won't need to come back to you with further requests for information, thus delaying the processing of your return.

IMPORTANT: Please note if you are planning to send your documents via email in a ZIP folder (compressed folder), please ensure you password-protect the folder and advise us of the password when you send it through. This will keep your data secure, and our system's anti-virus software won't block the email from reaching us. If you aren't sure how to set a password, [here's an instructional video](#).

Rental Property Questionnaire

Property Details

Address					
No.		Street			
Suburb				State	
				Postcode	

No. of weeks rented this year:		Answers
	Date property was purchased	
	Purchase price of the property	
	What is your % ownership of the property	
If sold during the year (i.e. sale contract signed during the year):		Answers
	Date property was sold	
	Sale price of the property	
If this property was sold during the year, please provide copies of the purchase and sale contracts, and the purchase and sale settlement statements		
If this property is managed by an agent, please attach the annual statement and <u>only include other income and expenses not shown on this statement below</u>		

Income			
		Amount \$	
Rental income			
Other related income			
Gross income			
Expenses			
	Amount \$		Amount \$
Advertising for tenants		Land tax	
Bank charges		Legal fees	
Body corporate fees		Pest control	
Borrowing expenses		Prop. Agent fees/com	
Cleaning		Repairs, maintenance (provide list)	
Council rates		Stationery, phone	
Gardening/lawn mowing		Sundry expenses	
Insurance		Water charges	
Interest on loans*			
*The ATO are checking loan transactions with lenders – please include copies of bank statements where applicable		Total Expenses	
New Acquisitions			
Eg. fridge, carpets, stove etc.	Date	Item Description	Amount \$
Item 1			
Item 2			
Item 3			
Item 4			
Item 5			
Item 6			
Item 6			
Item 7			
Item 8			
Item 9			
Item 10			

[illegible]

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