

2023 INDIVIDUAL TAX RETURN CHECKLIST

RENTAL INFO

Here's an additional checklist to help you if you have a rental property.

Rental Income

<input type="checkbox"/>	Real Estate Agents' statements summarising rental income and expenses for the 2022/23 year.
<input type="checkbox"/>	<p>Details of expenses paid personally for the rental property for the 2022/23 year. This could include:</p> <ul style="list-style-type: none"> • Advertising • Body Corporate/Strata Fees Paid • Cleaning • Council Rates • Emergency Services Levy • Gardening • Insurance • Land Tax • Lease Preparation Fees • Pest Control • Repairs & Maintenance • Water Rates
<input type="checkbox"/>	Does a capital allowance/depreciation schedule exist for the rental property? If yes then please provide the schedule.
<input type="checkbox"/>	Did you undertake any capital improvements to the property for the 2022/23 year? If yes then please advise details.
<input type="checkbox"/>	<p>Interest on Loan taken out to purchase property for the year ended 30 June 2023 along with and monthly or annual bank fees on the loan.</p> <p>Also if any borrowing costs were charged on the initial setup of the loan then advise details of these.</p>
<input type="checkbox"/>	If you bought or sold your rental property in the 2022/23 financial year then provide a copy of the settlement statement.