



EDEN

wealth accountants

TAX CHECKLIST

Name(s): _____

> *Investment Property*

Please complete and:
- Mail to PO Box 99, Canterbury VIC 3126;
- Visit us at Suite 1, 235 Camberwell Road, Hawthorn East VIC 3126; or
- Scan and email to Admin@EdenWealth.com.au

Eden Wealth Accountants – Investment Property Schedule

Property Address: _____

Original Purchase Price & Date: _____

Date Property First Rented: _____

Commercial or Residential: _____

Ownership Interest - who owns and in what percentages (%): _____

	YES	NO	COMMENTS
Registered for GST?	<input type="checkbox"/>	<input type="checkbox"/>	
Managed by an agent: Do you use an Estate Agent to manage the property? If so please provide annual rental statement provided by your agent.	<input type="checkbox"/>	<input type="checkbox"/>	
Self Managed: If you do not use the services of an Estate Agent to manage the property please provide records of rent received from tenants.	<input type="checkbox"/>	<input type="checkbox"/>	
Council rates: Please provide copies of rate statements.	<input type="checkbox"/>	<input type="checkbox"/>	
Land Tax: Please provide a copy of any land tax notifications received.	<input type="checkbox"/>	<input type="checkbox"/>	
Insurance: Please provided documentation of Insurance premiums paid	<input type="checkbox"/>	<input type="checkbox"/>	
Water Rates: Please provide payment details for water rates paid.	<input type="checkbox"/>	<input type="checkbox"/>	
Repairs & Maintenance: Did you pay for any repairs & Maintenance during the year? If so please provide receipts/invoices for repair work carried out.	<input type="checkbox"/>	<input type="checkbox"/>	
Depreciation: Do you have a Quantity Surveyors Report for the Property? If so please provide a copy.	<input type="checkbox"/>	<input type="checkbox"/>	
Capital Improvements: Did you make any capital improvements to the property during the year? E.g. add a Carport, landscape the Garden etc. If so please provide receipts/invoices.	<input type="checkbox"/>	<input type="checkbox"/>	

Eden Wealth Accountants – Investment Property Schedule

	YES	NO	COMMENTS
Interest on Loans: Did you pay interest on borrowed funds used to purchase the property? If so please provide loan statements for the tax year.	<input type="checkbox"/>	<input type="checkbox"/>	
Gardening and Lawn Mowing: Did you pay somebody to attend to the mowing or gardening? If so please provide receipts/invoices for services sourced.	<input type="checkbox"/>	<input type="checkbox"/>	
Body Corporate: Did you pay any body corporate fees during the year? If so please provide details of amount(s) paid.	<input type="checkbox"/>	<input type="checkbox"/>	
Other Expenses: Did you incur any additional expenses directly related to your property not recorded above? If so please provide details as to the expense along with supporting receipts/invoices .	<input type="checkbox"/>	<input type="checkbox"/>	

NOTES:
