

Rental Checklist

Client Name: _____

Tax Year: _____

Accountant: _____

Please fill out one form for each of your rental properties (including short stay accommodation):

What is the address of the property?

If the rental property is managed?

Provide the year end rental summary from the property manager

Was the rental property rented out all year?

If there was a break provide details as to why? _____

Do you manage your own rental property?

Please provide income & expenses for this property if not already available in Xero

Rent Received \$ _____

Mortgage Interest Paid \$ _____

Repairs & Maintenance \$ _____ (please provide breakdown)

Rates \$ _____ (land rates & water rates)

Insurance \$ _____ (provide invoice)

Legal Fees \$ _____ (provide invoice)

Advertising \$ _____

Improvements \$ _____ (please provide breakdown)

Travel

If you have travelled to the property for any inspections or repairs/maintenance then you can claim the mileage as a business cost, if this applies then please provide details of number of trips, reason for travel to property and which rental property.

Number of trips _____

Reason for trips _____