

TAX RETURN

RENTAL PROPERTY

INFORMATION

Please complete one form for each rental property.

GENERAL TAX INFORMATION

NAME

D.O.B.

TFN

RENTAL PROPERTY INFORMATION *Please complete one of these schedules per Property.*

Property Details

ADDRESS OF RENTAL PROPERTY

DATE PURCHASED

DATE RENTAL INCOME FIRST EARNT

NO. WEEKS AVAILABLE FOR RENT *(this year)*

DATE BUILT

OWNERSHIP DETAILS

 In your name In joint names *(please provide details)*

IF IN JOINT NAMES

NAME AND PERCENTAGE OWNED

OWNER 1

OWNER 2

OWNER 3

OWNER 4

Please ensure you have provided the purchase settlement statement and other purchase costs, e.g. stamp duty, legal fees, renovations or initial repairs, and any loan application fees and/or mortgage discharge expenses when you reach the end of the form.

Income

GROSS RENT	OTHER RENTAL INCOME
\$	\$

Expenses

EXPENSE TYPE	AMOUNT	EXPENSE TYPE	AMOUNT
Advertising for Tenants	\$	Stationery, Phone & Postage	\$
Borrowing Expenses	\$	Cleaning	\$
Council Rates	\$	Gardening / Lawn Mowing	\$
Insurance	\$	Interest on Loan(s)	\$
Land Tax	\$	Legal Fees	\$
Pest Control	\$	Property Management Fees	\$
Repairs & Maintenance	\$	Property Man. Commissions	\$
Body Corporate Fees	\$	Other Expenses	\$
Water Charges	\$		

Depreciable Items

ITEM	DATE PURCHASED	COST
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$

Improvements / Construction Costs *Please provide a copy of your tax depreciation schedule prepared by third party below.*

ITEM	DATE	COST
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$

OTHER INFORMATION *Please list any other information that you believe may assist us*

SUPPORTING DOCUMENT CHECKLIST

- Rental Property Purchase Settlement Statement / Costs
- Rental Property Depreciation Schedule (as prepared by Third Party)
- Rental Income Agent Summary
- Mortgage Bank Statements that were used to purchase the property or refinance the loans that were used to purchase the properties
- Rental Property Receipts and Invoices

Please complete the Authorisation below as this allows us to contact necessary organisations, to obtain information that is required to complete your Tax Returns.

AUTHORISATION

I authorise SNA Advisory to complete the compilation of Tax Return(s) for me/us for the 2022 financial year. I understand that a compilation is limited to the collection, classification and summarisation of financial information supplied by me and does not involve the verification of that information. I do not require SNA Advisory to carry out an audit or a review assignment on the information provided.

I authorise SNA Advisory to obtain whatever information is required from third parties to complete the preparation of my Tax Returns.

AUTHORISED SIGNATURE/S

Owner 1
Date:

Owner 2
Date:

Owner 3
Date:

Owner 4
Date: