

Investment Property Checklist

So we can ensure the time spent with your Davidsons accountant is as efficient as possible, please ensure you use this checklist and bring along the relevant information.

Property Address:	
Period of Occupancy: (date first made available)	
Rental Income	\$
Less: Property Expenses	
Advertising for Tenants	
Agent Fees/ Commissions	
Borrowing Expenses	
#Capital Improvements	
Cleaning	
Council Rates	
Gardening/Lawn Mowing	
Insurance	
Interest on Loans	
Land Tax	
Legal Fees	
Pest Control	
*Repairs & Maintenance	
Stationery, Postage & Telephone	
Water Charges	
Sundry Rental Expenses	
Total Expenses	\$
Net Profit (Loss) from rental property	\$

- Please provide a break up of all Repairs and Maintenance
- Please provide a break up of all capital improvements

Note: we do not require the documents supporting the information summarised above

If the investment property is sold during the year the following information is required

Original purchase documents, date of signing the contract & settlement statement

Selling Documents, date of signing the contract & settlement statement

If you have any questions prior to your appointment please
contact us on 03 5221 6399 or email us at info@davidsons.com.au

davidsons.com.au

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