

Rental Property Details

Address of rental property: _____

Ownership (tick and complete):

I / We (own personally) – Name(s): _____

Company – Name: _____

Trust – Name: _____

Partnership – Name: _____

Rental Income & Expenses

- Tick the applicable source category or write a total or note in the final column.
- Leave any category blank if it does not apply.
- If the rental is owned by a company or trust, we require all related bank statements and loan statements.

Category	Per Bank Statements	Per Invoice / Summary Attached	Specify Total or Add Note
Rental Income	<input type="checkbox"/>	(management summary attached) <input type="checkbox"/>	
Accountancy Fees <i>(not required if our service was used)</i>	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Advertising / Letting Fees	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Body Corporate Fees	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Insurance	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Interest (Loan)	<input type="checkbox"/>	(loan summary attached) <input type="checkbox"/>	
Legal Fees <i>(settlement statement required if property purchased during the year)</i>	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Property Management Fees	<input type="checkbox"/>	(management summary attached) <input type="checkbox"/>	
Rates	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Repairs & Maintenance (R&M)	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	

Other (please specify details as needed)

New Build

Is the rental property a new build? For 2025, existing properties are limited to 80% interest deductibility, returning to 100% in 2026.
 - A property is considered a new build if the Code Compliance Certificate was issued on or after 27 March 2020.

Yes No

Short-Term Rental Use

Is this property used as a short-term rental (e.g. Airbnb)?
 If you selected No, continue to the next section.
 If you selected Yes, please answer below:

Between 1 April 2024 and 31 March 2025, how many nights was the property listed as available to rent (and therefore not available for private use)?

– If your property was listed year-round with no private use, write 365/365
 – If your property was listed for 200 nights and blocked out for private use the rest of the year, write 200/365

Yes No

_____ / 365 nights

Fixed Assets / Chattels

Please complete this section if any chattels (e.g. stove, heat pump, blinds) were purchased or sold during the year. Chattels already declared in prior years do not need to be listed — we will automatically include your depreciation claim for this year.

- No new chattels purchased or sold this year
- See attached valuation report
- See list below

Description	Date Purchased / Sold	Amount (sold in brackets)

Home Office Claim

If your rental property is not managed by a property manager and you have an area set aside for managing the rental, you are entitled to claim a percentage of your home expenses.

-Leave blank if not applicable.

Same area as last year (tick if unchanged)	<input type="checkbox"/>
Total floor area of home (m ²)	
Area used for rental admin (m ²)	

Expense Type	Amount
Insurance (house only)	
Body Corporate Fees	
Mortgage Interest	
Rates	
Rent	
Phone & Internet	
Repairs & Maintenance	

Motor Vehicle Claim

If you travelled to the rental property during the year, you are entitled to claim a per-kilometre expense.

No travel to the rental property this year

Vehicle Type (tick one): Petrol Diesel Hybrid Electric

Total Kilometres Travelled for Rental Purposes: _____ km

Delivery of Your Financial Statements & Tax Returns

Please select your preferred method of delivery:

Electronic copy (emailed to you)

Hard copy posted

Postal address (if hard copy required):
