

Siganos Sydney Accountants

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RENTAL PROPERTY INVESTMENT CHECKLIST

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TAX YEAR (FY): _____

1. CLIENT & PROPERTY DETAILS

Client Full Name

Property Address

Suburb

Date first earned rental income

Are you an Australian Resident for Tax Purposes?

YES

[]

NO

[]

If No, provide Visa Type

If worked less than a full year, provide dates (from / to)

2. OWNERSHIP DETAILS

Do you share ownership of the property?

YES

[]

NO

[]

- Name and % ownership
- Name and % ownership
- Name and % ownership
- Name and % ownership

3. PROPERTY PURCHASE

Was the property purchased during the year?

YES

[]

NO

[]

If yes, please provide a copy of the following documents:

- Purchase contract
- Settlement statement

PROVIDED

[]

[]

N/A

[]

[]

• Loan statements, if applicable	☐	☐
• Other expenses incurred in purchasing the property e.g. Registration fees, building & pest inspections, search fees	☐	☐

4. PROPERTY SALE

	YES	NO
Was the property sold during the year?	☐	☐

If yes, please provide a copy of the following documents:

	PROVIDED	N/A
• Sale contract	☐	☐
• Settlement statement	☐	☐
• Other expenses incurred in sale of the property e.g. Legal fees, advertising, commission on sale	☐	☐
* Settlement & Other Legal Documents — Please email across settlement documents if available along with associated costs to acquire/sell the property.		

5. ANNUAL RENTAL DOCUMENTS

Please provide a copy of the following documents:

	PROVIDED	N/A
• Annual rental property statement from agent	☐	☐
• Loan statements for the year	☐	☐
• Summary of other rental expenses (not paid by agent)	☐	☐
• Property tax depreciation report, if applicable	☐	☐

6. RENTAL INCOME

• Gross rental income received	\$	
• Other rental income e.g. reimbursements & recoupments	\$	

7. RENTAL EXPENSES

Please complete all applicable items. For all property repair expenses costing more than \$300.00, provide an item listing that includes the date of purchase along with this checklist — these items will be depreciated over multiple years.

• Advertising for tenants	\$	
• Body corporate fees	\$	
• Cleaning	\$	
• Council rates	\$	
• Electricity	\$	
• Gardening / lawn mowing	\$	
• Gas	\$	
• Insurance	\$	
• Interest on loan/s	\$	
• Pest control	\$	
• Agent fees / commission	\$	
• Repairs and maintenance	\$	
• Stationery, telephone & postage	\$	
• Water rates	\$	
• Other rental expenses	\$	

8. CAPITAL WORKS & DEPRECIATION

You need to subtract any capital works & depreciation deductions if you acquired the rental property after 13 May 1997 and you claimed a deduction for capital works & depreciation in previous years, as these deductions devalue your asset.

	PROVIDED	N/A
• Property tax depreciation schedule / report	[]	[]
• Capital works expenditure records	[]	[]
• Total capital works deduction claimed this year (\$)	\$	
• Total depreciation on plant & equipment (\$)	\$	

9. OTHER INCOME

Foreign Income — if you have received foreign income, you must provide your recent lodged tax returns from the overseas country, along with the foreign tax paid.

Funds & Cryptocurrency — We will require the tax statements / summaries from your funds & cryptocurrency platforms. These tax statements may attract additional costs (which are tax deductible on any profit generated). For all Cryptocurrency activity we recommend Koinly (koinly.io) — compliant with Australian Tax laws & supported by over 20 countries.

- Foreign income — country and amount

- Foreign tax paid (\$)

- Crypto / digital assets — platform and summary attached?

- Funds / managed investment tax statement attached?

10. NOTES & OTHER COMMENTS

11. CLIENT DECLARATION

I declare that the information provided in this checklist is true, correct and complete. I understand that it is an offence to knowingly make a false or misleading statement to the ATO. I authorise Siganos & Co Pty Ltd to prepare and lodge my income tax return on my behalf.

Client Signature

Date

Privacy Notice: Personal information collected on this form is used solely for the preparation of your income tax return and associated tax services. Information is handled in accordance with the Privacy Act 1988 (Cth) and the Australian Privacy Principles. We do not disclose your information to third parties except as required to fulfil our tax agent obligations or as required by law.