

Investment Property Annual Tax Summary

Please complete a separate summary for each investment property you own

Property Address

Street		
Suburb	State	Postcode

Weeks rented this financial year (see Real Estate Statement)

Date property first earned rental income

Have you sold this property?

PLEASE PROVIDE THE BUY CONTRACT AND SELL CONTRACT FOR Capital Gain calculation

NOTE: ATO track all land sales so they are waiting for you to self assess.

Ownership

	Name	Percentage owned
Person 1		
Person 2		%
Person 3		%
Person 4		%

Income

Rent per week

\$

Gross Annual rent received before fees

\$

Rental Deductions

Property management fees

\$

Council Rates

\$

Interest on Investment Loan 1

Refer to 30 June bank
stmt or internet banking

\$

Interest on Investment Loan 2

\$

Bank charges on loans

\$

Strata Levies / Body Corporate

\$

Depreciation - Fixtures & Fittings

\$

Depreciation - Building

\$

Repairs & Maintenance

\$

TRAVEL NO LONGER DEDUCTIBLE

XXXXXXXXXXXXXXXXXX

Insurance - Building and Landlord

\$

Postage & Stationary

\$

Other

\$

Please ensure you have included all expenses for the full period the property was/is available for rent

1 July - 30 June of the relevant financial year

Attach all source docs to this summary or email scans of source docs to support this summary