TIG BENDIGO

Rental Property Tax Return Organiser 2023 - 2024

If ***Tax Integrity Group Bendigo*** has not prepared your return previously, please attach a full copy of your previous year's tax return and any other relevant information.

Your Name: _____

PROPERTY 1 Address: _____

Suburb: _____ State: _____ Post code: _____

Date property was acquired: _____ Acquisition cost: $ _____

If property was sold during the year, date of sale: _____

PROPERTY 2 Address: _____

Suburb: _____ State: _____ Post code: _____

Date property was acquired: _____ Acquisition cost: $ _____

If property was sold during the year, date of sale: _____

PROPERTY 3 Address: _____

Suburb: _____ State: _____ Post code: _____

Date property was acquired: _____ Acquisition cost: $ _____

If property was sold during the year, date of sale: _____

NB: if rental property is sold, please provide Settlement Statement for CGT calculation purposes

INCOME			
	PROPERTY 1	PROPERTY 2	PROPERTY 3
Rental Income			
Insurance Recoveries			
Other Rental Related Income			

EXPENSES			
	PROPERTY 1	PROPERTY 2	PROPERTY 3
Advertising			
Body Corporate Fees & Charges			
Borrowing Expenses			
Building Write Off*			
Cleaning			
Council Rates			
Depreciation*			

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	PROPERTY 1	PROPERTY 2	PROPERTY 3
Gardening / Lawn Mowing			
Insurance			
Interest on Loans			
Land Tax			
Legal Expenses			
Pest Control			
Property Agents Fees/Commission			
Quantity Surveyor Fees			
Repairs & Maintenance**			
Stationery, Telephone & Postage			
Stamp Duty (deductible only in Canberra[1])			
Travel/Inspection Expenses***			
Water Charges			
Sundry Expenses (please provide details)			

* Will be calculated by ***Tax Integrity Group Bendigo*** if we hold records.
** Please provide receipts so we can determine if they are in fact repairs/maintenance or capital items per the tax legislation.
*** Travel expenses incurred in respect of a residential rental property (e.g., travel related to inspecting or maintaining a rental property) are no longer deductible as of 1 July 2017.

Capital Expenses over $300

Please list capital/asset items, including purchase date and note which property these expenses apply:

SHARED OWNERSHIP

Where ownership of the property is shared, please advise of the percentage entitlement:

Name:		%
Name:		%

If new property, we require the following:

☐ Statement of Adjustments on Purchase	☐ Loan Establishment and other costs
☐ Stamp Duty cost	☐ Loan Statements
☐ Registration of Title Costs	☐ Quantity Surveyor Report or List of Depreciable Assets
☐ Legal fees on Purchase	

[1] Freehold title cannot be obtained for properties in the Australian Capital Territory (ACT). They are commonly acquired under a 99-year crown lease. Therefore, stamp duty, preparation and registration costs you incur on the lease of an ACT property are deductible to the extent that you use the property as a rental property.