

2018 Tax Return

Rental Property Information

Please e-mail or post this form back to our office or bring to your appointment:

TO: Excel Financial Advisors

ATTENTION: Stuart E-MAIL: admin@exceladvisors.com.au

YOUR NAME:

YOUR SIGNATURE:

PROPERTY DETAILS			
Address of Rental Property:			
Date Property Purchased:		Date Property First Earned Rental Income:	
Number of Weeks Available For Rent this year:		Date Property Built:	
Ownership Details:	<input type="checkbox"/> In Your Name <input type="checkbox"/> In Joint Names (please supply details)		
<small>** Please email, fax or post to us the purchase settlement statement and other purchase costs, e.g. stamp duty, legal fees, renovations or initial repairs, and any loan application fees and/or mortgage discharge expenses (if you haven't already). **</small>			
INCOME – 1 July 2017 to 30 June 2018			
Gross Rent:	\$	Real Estate annual statements provided (Y or N)	Bank Statements showing rental payts received if privately rented (Y or N)
Other Income:(eg water)	\$	Insurance Payout?	
PROPERTY DETAILS – 1 July 2017 to 30 June 2018			
Advertising for Tenants:	\$	Body Corporate Fees:	\$
Borrowing Expenses:	\$	Cleaning:	\$
Council Rates:	\$	Gardening / Lawn mowing:	\$
Insurance:	\$	Loan Interest:(please provide statements)	\$
Land Tax:	\$	Legal Fees:	\$
Pest Control:	\$	Property Management Fees/Commission:	\$
Repairs & Maintenance:	\$	Stationery, Telephone & Postage:	\$
Note: you can no longer claim travel to rental property	\$	Water Charges:	\$
Other:	\$	Other:	\$
ITEMS BOUGHT– 1 July 2017 to 30 June 2018			
ITEM DETAILS		DATE PURCHASED	COST
			\$
			\$
			\$
			\$
IMPROVEMENTS / CONSTRUCTION COSTS – 1 July 2017 to 30 June 2018			
<small>Please email or post to our office a copy of your tax depreciation schedule prepared by third party (if you haven't already or we can organise the QS Report for you if you don't have one).</small>			
DETAILS OF NEW COSTS		DATE	COST
			\$
			\$