



**PRESTIGE PARTNERS**

ADVISORY | SOLUTIONS | GROWTH

## 2026 Rental Property Checklist

*(A separate form must be completed for EACH rental property owned)*

Full address of rental: \_\_\_\_\_  
\_\_\_\_\_

Full name of owner/s: \_\_\_\_\_  
\_\_\_\_\_

• **WAS THIS RENTAL PURCHASED BETWEEN 1 JULY 2025 TO 30 JUNE 2026?**

☐ NO.

☐ YES. If yes, please provide:

☐ Loan contract (if applicable)

• **IS THIS THE FIRST YEAR PRESTIGE PARTNERS IS PREPARING THE RENTAL SCHEDULE?**

☐ NO.

☐ YES. If yes, please provide:

☐ FINAL PURCHASE settlement statement

☐ Certificate of title if NOT jointly owned in equal proportions

☐ Date rental was first available for rent: \_\_\_\_/\_\_\_\_/\_\_\_\_

☐ Quantity surveyor's report/depreciation report (if applicable)

• **IS THERE ANY PRIVATE USE OF THE RENTAL?**

☐ NO.

☐ YES. If yes, private use % \_\_\_\_\_

• **DID YOU REFINANCE THE INVESTMENT LOAN/S BETWEEN 1 JULY 2025 TO 30 JUNE 2026?**

☐ NO.

☐ YES. If yes, please provide:

☐ Loan contract

• **DID YOU SELL THE RENTAL BETWEEN 1 JULY 2025 TO 30 JUNE 2026?**

☐ NO.

☐ YES. If yes, please provide:

☐ FINAL SALE settlement statement

• **WOULD YOU LIKE TO REVIEW YOUR INVESTMENT LOAN?**

☐ NO.

☐ YES



• **WAS THE PROPERTY MANAGED BY A REAL ESTATE AGENT?**

☐ NO. If no, please provide the following information along with supporting documentation:

- ☐ Total rental income received between 1 July 2025 to 30 June 2026.
- ☐ Other rental related income (if any)
- ☐ Loan account statements covering 1 July 2025 to 30 June 2026
- ☐ Invoices/receipts for expenses:  
*(please tick and provide supporting documents for expenses that are applicable only)*

- ☐ Assets purchased
- ☐ Cleaning
- ☐ Council rates
- ☐ Gardening
- ☐ Insurance (eg. Landlord, Building)
- ☐ Land tax
- ☐ Legal fees
- ☐ Pest control
- ☐ Repairs and maintenance
- ☐ Stationery and/or postage
- ☐ Strata levy
- ☐ Phone
- ☐ Water charges
- ☐ Other expenses not included above

☐ YES. If yes, please provide:

- ☐ Annual rental summary statement, and/or
- ☐ Monthly rental summary statements for the financial year
- ☐ Loan account statements covering 1 July 2025 to 30 June 2026
- ☐ Invoices/receipts for expenses NOT on rental summary statements:

*(please tick and provide supporting documents for expenses that are applicable only)*

- ☐ Assets purchased
- ☐ Cleaning
- ☐ Council rates
- ☐ Gardening
- ☐ Insurance (eg. Landlord, Building)
- ☐ Land tax
- ☐ Legal fees
- ☐ Pest control
- ☐ Repairs and maintenance
- ☐ Stationery and/or postage
- ☐ Strata levy
- ☐ Phone
- ☐ Water charges
- ☐ Other expenses not included above

(Continued over the page)



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**I confirm that the above information is correct to the best of my knowledge and that where necessary I hold documentary evidence in support of my claims.**

Dated the ..... day of ..... 20.....

.....  
Signature of Taxpayer

.....  
Name (print)