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Summarise income and expenses relating to any investment properties that you may hold.

Please bring receipts, invoices and bank statements etc to substantiate all of these items.

**1: Name Of Owners:** \_\_\_\_\_ **% Ownership** \_\_\_\_\_%

\_\_\_\_\_ %

\_\_\_\_\_ %

**Address:** \_\_\_\_\_

**Date Acquired:** \_\_\_\_ - \_\_\_\_ - \_\_\_\_ **Purchase Price:** \$ \_\_\_\_\_

**Date of First Income:** \_\_\_\_ - \_\_\_\_ - \_\_\_\_ **Rented for Full Year:** Yes / No  
**Number of Days Rented:** \_\_\_\_\_

**2: Income:** Please bring statements from agents or receipt books \$ \_\_\_\_\_

**3: Expenses:**

Accounting Fees	\$	Interest	\$
Advertising	\$	Land Taxes	\$
Bank Charges	\$	Legal Fees	\$
Body Corporate Fees	\$	Postage & Stationery	\$
Telephone	\$	Council Rates	\$
Pest Control	\$	Insurance	\$
Water Rates	\$	Gardening/Lawn Mowing	\$
Electricity	\$	Property Agent Fees	\$
Cleaning	\$	Travel costs to inspect property	\$

**\*\*Travel to inspect investment properties may no longer be deductible as of 1 July 2017 – Legislation is being developed for this measure**

## 4: Purchase or re-finance of Investment Property:

If you have purchased or re-financed this property during the year, please list the borrowing costs.

Mortgage Establishment fee	\$	Legal fees	\$
Valuation fees	\$	Search fees	\$
Registration fees	\$	Stamp Duty on Loans	\$

- If you have purchased a property which was built after 1985, (or has had substantial redevelopment in the last 5 years) please provide a quantity surveyors report if available to determine tax depreciation and building allowances for the property. If you are unable to provide a quantity surveyor's report, please list all fixtures and fittings showing a valuation.

## 5: Assets & Capital Works:

Description:	Date Purchased:	Amount:
_____	__ - __ - __	\$ _____
_____	__ - __ - __	\$ _____
_____	__ - __ - __	\$ _____