

RENTAL PROPERTY QUESTIONNAIRE – 2026

Address of property _____

Date purchased _____

1. Is the property Commercial or Residential? _____

2. Are you registered for GST purposes? **YES/NO**

3. Who are the legal owners of the rental property? (*i.e. the legal owners on the title or deed*)

Provide a first page of contract and settlement statement

A _____ B _____

C _____ D _____

4. Have the expenses and income in relation to the property been distributed to the owners in a different proportion to their legal ownership in the rental property? **YES/NO**

If **yes**, please provide reasons why the percentage of expenses and income differ from the legal ownership:

5. When was the rental property first available for rental purposes? ____ / ____ / ____

6. When was the property first used for rental purposes? ____ / ____ / ____

7. How many weeks this year was the property **NOT** rented? _____ weeks

8. If the property was vacant during the year of income was it available for rent and what steps were taken to find a tenant during this period:

Do you have any evidence to support the efforts taken to find a suitable tenant for your property? (*e.g. real estate agent listings, copies of advertisements*)

Please explain:

9. Was there any private use of the property? **YES/NO**

If **yes**, number of days of private use throughout the year: _____

10. Was the property rented to an owner, relative or associate of an owner? **YES/NO**

If **yes**, please provide details of the tenant and their association with the owner(s) of the rental property:

11. Is the property being rented at less than the market rental value? YES/NO

If **yes**, please provide reasons why the property is being rented at less than market value:

12. Have you made any improvements or repairs to the property during the year? YES/NO

Please provide details of all expenses incurred to allow the correct allocation and tax deductions to be made.

13. Is the building write-off under Division 43 being claimed in respect of the rental property? YES/NO

If **yes**, then how has the **construction cost** of the property been ascertained:

14. (a) Has finance been obtained by any of the legal owners in order to purchase the rental property? YES/NO

(b) Have you obtained any additional finance over the property? YES/NO
What was the purpose of this finance?

If **yes**, to either of the above please provide details of the borrower and the amount under finance:

	Borrower	Finance amount	Purpose
1			
2			

15. Is depreciation being claimed in respect of chattels or fittings that are contained within the rental property? YES/NO

If **yes**, how was the depreciable value of the chattels and fittings determined when the property was originally acquired by the taxpayer(s):

Please provide details and receipts for new chattels or fittings acquired during the year.

Please provide details and receipts for any property improvements carried out during the year.

Taxpayer's rental property declaration

A. I confirm that the above details in relation to my interest in the rental property are correct and that I have declared all income and expenses in relation to my taxation affairs for the 2026 income year;

B. My tax agent has explained to me the law as it relates to owning a rental property; and

C. I understand that if I have any further queries, it is my responsibility to raise them with my tax agent or request a Private Binding Ruling from the ATO.

Signed

Signed

Dated

PLEASE ALSO COMPLETE THE ATTACHED WORKSHEET

RENTAL PROPERTY WORKSHEET

Income and expenditure statement
For the period 1 July 2025 to 30 June 2026

Address of property: _____
(Please provide a separate statement for each property)

If you receive an annual summary from a real estate agent, please enclose, and only list additional expenses incurred.

Please complete this statement listing the **total income and expenses of the rental property**, not just your share.

Income

\$

Gross rental income _____
Other rental related income (e.g., insurance recoups,
defaulted security deposits) _____

Expenses

Interest on mortgage _____
Agent management fees/commission _____
Agent inspection fees _____
Advertising _____
Bank charges _____
Body corporate fees (strata levy) _____
Borrowing expenses _____
Building & structural improvement write-off
(2.5 % x _____) _____
Cleaning _____
Depreciable assets purchased
(please provide description, date purchased & cost)
_____ _____
_____ _____
_____ _____

Insurance _____
Pest control _____
Postage and sundries _____
Gardening/lawn mowing _____
Rates: Council _____
Water _____
Land tax (please provide copy of assessment) _____
Repairs and maintenance (provide details)
_____ _____
_____ _____
_____ _____

Other rental expenses (please specify)
_____ _____
_____ _____