



RENTAL PROPERTY DOCUMENT CHECKLIST

Please tick each attachment you provide to us

Please provide copies of each ticked document (and not originals)

New Clients Only - Please provide a copy of your prior years Income Taxation Return

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CLIENT NAME _____ PHONE _____

PROPERTY ADDRESS _____

OWNERSHIP _____ %
_____ %

Have you purchased or sold the property during the financial Year?

- Sold Purchased

If yes, please provide the following:

- Offer and Acceptance Contract Settlement Statement

When was the last time the property was refinanced? _____

Number of weeks the property was available for rent? _____

Number of weeks the property was rented? _____

Please provide the following documents (or excel summary) every year:

- Annual rental statement from your property manager
- Loan bank statements
- Land tax / water rates / council rates
- Strata fees
- Depreciation report
- Utilities (Water, gas and electricity if not paid by tenant)
- Insurance (Building and/or landlord)
- Advertising costs for new tenants
- Capital improvements (major works)(please provide copy of invoice)
- Gardening
- Cleaning
- Pest control
- Repairs and maintenance
- Postage / stationery / telephone
- Other: Please specify _____

Additional Notes:
