Please e-mail or fax this form back to our office **PRIOR** to your appointment, or bring it along to your appointment.

**TO:** **Sage Business Group**  **FAX:** 03 9744 6577

**ATTENTION:** [ACCOUNTANT NAME] **E-MAIL:** [admin@sagegroup.com.au](mailto:admin@sagegroup.com.au)

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| --- | --- | --- | --- |
| **CLIENT NAME:** |  | **CLIENT SIGNATURE:** |  |

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| **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:** |  **In Your Name** | |  **In Joint Names** (please supply details) | | | | | |
| ***\*\* 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). \*\**** | | | | | | | | |
| **IMPROVEMENTS / CONSTRUCTION COSTS** | | | | | | | | |
| ***Please email, fax or post to our office a copy of your tax depreciation schedule prepared by third party (if you haven’t already).*** | | | | | | | | |
| **ITEM** | | | | | **DATE** | | **COST** | |
|  | | | | |  | |  | |
|  | | | | |  | |  | |
|  | | | | |  | |  | |
| **INCOME – 1 July 2019 to 30 June 2020** | | | | | | | | |
| **Gross Rent:** | **$** | | | | | | | |
| **Other Rental Income:** | **$** | | | | | | | |
| **PROPERTY DETAILS – 1 July 2019 to 30 June 2020** | | | | | | | | |
| **Advertising for Tenants:** | **$** | **Body Corporate Fees:** | | | | | | **$** |
| **Borrowing Expenses:** | **$** | **Cleaning:** | | | | | | **$** |
| **Council Rates:** | **$** | **Gardening / Lawn mowing:** | | | | | | **$** |
| **Insurance:** | **$** | **Interest on Loan/s:** | | | | | | **$** |
| **Land Tax:** | **$** | **Legal Fees:** | | | | | | **$** |
| **Pest Control:** | **$** | **Property Management Fees/Commission:** | | | | | | **$** |
| **Travel:** | **$** | **Stationery, Telephone & Postage:** | | | | | | **$** |
| **Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **$** | **Water Charges:** | | | | | | **$** |
| **Repairs & Maintenance:** | **Date:** | **Detail:** | | | | | | **Cost:** |
|  |  |  | | | | | |  |
|  |  |  | | | | | |  |
|  |  |  | | | | | |  |
|  |  |  | | | | | |  |
| **Replacement ITEMS – 1 July 2019 to 30 June 2020** | | | | | | | | |
| **ITEM** | | | | **DATE PURCHASED** | | | | **COST** |
|  | | | |  | | | | **$** |
|  | | | |  | | | | **$** |
|  | | | |  | | | | **$** |