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

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

|  |
| --- |
| **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** |
|  |  | **$** |
|  |  | **$** |
|  |  | **$** |