

Non-Resident Australian Tax Return Checklist

- 1 Last Tax Return Lodged
- 2 Contract for purchase of Land and/or Buildings
- 3 Contract for sale of Land and/or Buildings
- 4 Settlement Statement for purchase and/or sale
- 5 Loan Agreement and/or Bank Correspondence (for calculation of borrowing costs)
- 6 Bank Loan Statements from 1st July to 30th June for investment related loans
- 7 Property Managers Annual Income & Expense Statement
- 8 Receipts for all out of pocket expenses not included in property managers report, for example;
 - Council rates
 - Insurance
 - Land tax
 - Pest control
 - Repairs and maintenance
 - Travel
 - Water rates & consumption charges
- 9 History of property (in time line format) – ie has it been a main residence or has it been rented for entire ownership period
- 10 Depreciation Report/Quantity Surveyor Report
- 11 Tax Agent fees for previous year for preparation of your Australian Tax Return
- 12 Market Valuation Reports prepared by Licenced Valuer (for CGT purposes)

Schedule of Fees

Fees are charged on an hourly rate required to complete the Engagement.
An estimate can be provided before commencement of work.
(Please refer to Engagement Letter)
Base Rate for Individual Return with Rental Property managed by an agent
\$300 + GST