

# W H I T I N G S

Chartered Accountants • Business Consultants

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## **CHECKLIST OF PRINCIPAL ITEMS REQUIRED FOR RENTAL PROPERTY**

- Annual Agent Statement detailing:
  - Gross Income
  - Expenses paid by the Agent
- Summary of expenses paid personally i.e. rates, repairs, land tax, capital purchases ie date of invoice/receipt, suppliers name, amount, purpose
- Details of travel expenses.
- Copies of all bank loan statements
  - Where you use an Equity Loan account, please identify any drawings relating to the property and those that are private.
- Copies of all settlement statements and Bank approvals where you have purchased or sold a property during the financial year including those regarding the original acquisition where the property is sold.