DOCUMENTATION LIST
Renewal Client

- Rental manager statements or annual rental summary

- Bank loan statements for property mortgage

- If there are any bank fees charged in your bank savings statement, please forward us the statements

- Receipts for all expenses (if not paid by managing agent)
  - Advertising
  - Council and utility fees
  - Building and landlords insurance
  - Strata fees (if a unit)
  - State Land tax
  - Repairs and maintenance
  - Bank currency transfer fees
  - Any other relevant sundry expenses

- Managed funds or trust distributions statements
  - If there are distribution of capital gains from Taxable Australia Real Property (TARP) such as an Australian property trust

If you have purchased or sold a property during the financial year, kindly forward us the following

- Purchase / sales contract date
- Settlement statement on purchase / sale
- Legal fees paid on purchase / sale
- Stamp duty and foreign buyers fee paid on purchase / sales commission paid on sale
- Any loan cost incurred to obtain the loan / discharge the loan
- Any other expenses paid out on your own for the purchase / sale
- FIRB foreign buyers fee paid

THINGS TO NOTE

- Kindly note that as a nonresident for tax purposes, all Australian bank interest income should be subjected to 10% withholding tax. If this is not taken at source, please contact your bank to inform them to deduct.

- All original documentation should be provided to us. If you would like to provide us with a summary of your workings, ATS cannot be held accountable for the accuracy of the data and we will not be responsible for any ATO audit matters relating to information presented on such summaries.

- Land Tax - Each property in Australia may be subject to a state land tax charge. Each state has differing rates and tax free allowances as well as surcharges for foreign owners, so you should check your personal obligations.