Rental property papers for tax time

Tick each one you have. PropRetire files them by property and year.

Updated 26 Nov 2026

From buying the place

10 papers · 0 in hand

Paper	Who asks
☐ Contract of sale	Accountant · Conveyancer
☐ Settlement statement (statement of adjustments)	Accountant
☐ Transfer (stamp) duty assessment	Accountant
☐ Title search showing who owns what share	Accountant · Broker
☐ Loan offer and loan contract	Accountant · Broker
☐ Statements of lenders mortgage insurance and the loan's setup fees	Accountant
☐ Conveyancer's or solicitor's invoice	Accountant
☐ Building and pest inspection reports and invoices	Accountant
☐ Depreciation schedule	Accountant
☐ Valuation from when your former home was first rented out	Accountant

Each year

21 papers · 0 in hand

Paper	Who asks
☐ End of year statement	Accountant
☐ Monthly rental statements	Accountant · Broker
☐ Lease agreement	Accountant · Broker
☐ Property management agreement and fee invoices	Accountant

Paper	Who asks
☐ Bank statements showing the rent paid in	Accountant
☐ Bond lodgement receipt, and a note of any bond you kept	Accountant
☐ Invoices for advertising for tenants	Accountant
☐ Loan statements for the financial year	Accountant · Broker
☐ Council rates notices	Accountant · Conveyancer
☐ Water notices	Accountant · Conveyancer
☐ Strata levy notices	Accountant · Conveyancer
☐ Strata meeting minutes	Conveyancer
☐ Land tax assessment	Accountant
☐ Landlord insurance policy and renewal	Accountant
☐ Certificate of currency for building insurance	Broker
☐ Invoices for repairs and upkeep	Accountant
☐ Invoices for renovations or new fixtures	Accountant
☐ Insurance claim letters and payout notices	Accountant
☐ Photos of the place before and after any works	Accountant
☐ Your accountant's or tax agent's invoice	Accountant
☐ A note of the dates you lived in it, used it yourself or it stood empty	Accountant

When you refinance

3 papers · 0 in hand

Paper	Who asks
☐ Recent loan statements	Broker
☐ Lease and recent rental statements, or a rental appraisal	Broker
☐ Rates notice and insurance certificate	Broker

When you sell

4 papers · 0 in hand. Plus everything from buying the place, and

each renovation invoice.

Paper	Who asks
☐ Contract of sale and settlement statement for the sale	Accountant
☐ Selling agent's commission and advertising invoices	Accountant
☐ Approvals and compliance certificates for any works	Conveyancer
☐ Latest rates, water and strata notices	Conveyancer

General information only. Your accountant tells you what each paper means for your tax.