Rental property request list for accountants

The 31 papers to ask a rental property client for, by stage, with where each comes from. Send it as a PDF or a spreadsheet.

Updated 26 Nov 2026

From buying the place

10 papers

Paper	Where it comes from
Contract of sale	Your conveyancer or solicitor
Settlement statement (statement of adjustments)	Your conveyancer
Transfer (stamp) duty assessment	Your state revenue office, through your conveyancer
Title search showing who owns what share	Your state's land registry
Loan offer and loan contract	Your lender
Statements of lenders mortgage insurance and the loan's setup fees	Your lender
Conveyancer's or solicitor's invoice	Your conveyancer or solicitor
Building and pest inspection reports and invoices	Your inspector
Depreciation schedule	A quantity surveyor
Valuation from when your former home was first rented out	A valuer

Each year

19 papers

Paper	Where it comes from
End of year statement	Your property manager
Monthly rental statements	Your property manager
Lease agreement	Your property manager
Property management agreement and fee invoices	Your property manager

Paper	Where it comes from
Bank statements showing the rent paid in	Your bank
Bond lodgement receipt, and a note of any bond you kept	Your state's bond authority
Invoices for advertising for tenants	The site or agent
Loan statements for the financial year	Your lender
Council rates notices	Your council
Water notices	Your water authority
Strata levy notices	Your strata manager
Land tax assessment	Your state revenue office
Landlord insurance policy and renewal	Your insurer
Invoices for repairs and upkeep	Each tradie or service
Invoices for renovations or new fixtures	Your builder or tradie
Insurance claim letters and payout notices	Your insurer
Photos of the place before and after any works	You
Your accountant's or tax agent's invoice	Your accountant
A note of the dates you lived in it, used it yourself or it stood empty	You

When you sell

2 papers. Plus everything from buying the place, and each renovation invoice.

Paper	Where it comes from
Contract of sale and settlement statement for the sale	Your conveyancer
Selling agent's commission and advertising invoices	Your selling agent

General information only.