

Rental Property Admin Checklist

Annual Rental Property Check-Up

Property Address: _____

Review Date: _____

Property Information

Done	Document to check	Notes/ where saved?
☐	Ownership records	
☐	Purchase and settlement documents	
☐	Key property contacts	

Tenancy Records

Done	Document to check	Notes/ where saved?
☐	Current tenancy agreement	
☐	Tenancy renewals or variations	
☐	Important tenant correspondence	

Healthy Homes

Done	Document to check	Notes/ where saved?
☐	Healthy Homes compliance documentation	
☐	Assessment reports	
☐	Records of compliance work completed	

Insurance

Done	Document to check	Notes/ where saved?
☐	Current insurance schedule	
☐	Policy renewal documents	
☐	Claims documentation	

Loan & Finance

Done	Document to check	Notes/ where saved?
☐	Current loan statements	
☐	Annual interest summary	
☐	Refinancing documentation	

Maintenance & Repairs

Done	Document to check	Notes/ where saved?
☐	Repairs and maintenance invoices	
☐	Contractor details	
☐	Warranties and guarantees	
☐	Major improvements documentation	

Property Manager Records

Done	Document to check	Notes/ where saved?
☐	Monthly owner statements	
☐	Annual rental summary	
☐	Inspection reports	
☐	Rental income records	

Document Storage

Done	Document to check	Where saved?
☐	Rates notices	
☐	Documents stored in one central location	
☐	Digital copies backed up securely	
☐	Files organised by financial year	
☐	Missing documents identified and requested	

Final check

☐ I can easily find any key rental property document when I need it.

Notes:

Note: This checklist is provided as a general guide to help organise your rental property records. The documents you need to keep may vary depending on your circumstances.