

# Rental Questionnaire – 31 March 2009

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2009	Fax:	
		Email:	

To: Accountants First

Signature \_\_\_\_\_ Date \_\_\_\_\_

<b>Property Details</b>	
Please provide us with the addresses of any rental properties you have. 1. Address: _____ 2. Address: _____ 3. Address: _____	If a property was not rented for a full 12 months, please provide details of why it was vacant. _____ _____

<b>Rental Income and Expenditure</b>		ü
Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties		C
<b>OR</b>		
Please provide details of the following for each rental property. Use a separate sheet if necessary.		
<b>Income:</b>		C
Total Rent Received	\$ _____	
<b>Expenses:</b>		
Rates	\$ _____	
Insurance	\$ _____	
Repairs and Maintenance (please attach details or invoices)	\$ _____	
Mortgage Interest (attach copy of loan summary/statements from bank)	\$ _____	
Details of any other expense relating to rental property:		
_____	\$ _____	
_____	\$ _____	
Details of visits to inspect property/conduct property business:		
Date	Details	Kilometres
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>Home Office Expenses</b>	
<p>If part of your home is set aside principally for use as an office/workshop/storage area which is used by you in relation to your rental property, you <b>may</b> be able to claim a proportion of your home expenses against your rental income. Please provide the following details:</p> <p>Business Area: _____ m<sup>2</sup></p> <p>Total Area: _____ m<sup>2</sup></p> <p>Power \$ _____</p> <p>Insurance (Building &amp; Contents) \$ _____</p> <p>Interest (House Mortgage) \$ _____</p> <p>Rates \$ _____</p> <p>Repairs &amp; Maintenance \$ _____</p> <p>Other \$ _____</p> <p><b>Total</b> \$ _____</p> <p>Cost of House and Section \$ _____</p> <p>Cost of Section \$ _____</p> <p>Construction materials: (timber, brick, etc)</p> <p>_____</p>	C
<b>Other Details Required</b>	
<ul style="list-style-type: none"> <li>• Solicitors Settlement Statement</li> <li>• Sale and Purchase Agreement</li> <li>• Loan details for property purchased</li> <li>• A copy of the latest Rateable Valuation</li> <li>• A list of Chattels and their value for properties bought or sold during the year</li> </ul>	C C C C C

**Thank you for completing this questionnaire  
Don't forget to sign it**

