**Rental Questionnaire – 31 March 2024**

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| --- | --- |
| Name | Phone |
| Address | Mobile |
|  | Email |

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| --- |
| Bank Account number for Refunds |

|  |  |
| --- | --- |
| **Information Required** | **Yes, No, N/A, Comment** |
| **Rent Received** |  |
| **Either**:  A: Provide bank statements for all business accounts with the payments clearly detailed  **Or**  B: Provide a Summary of Rental Income and Expenses  Rent Received $\_\_\_\_\_\_\_\_\_\_\_\_  Expenses  Accounting $\_\_\_\_\_\_\_\_\_\_\_\_  Advertising $\_\_\_\_\_\_\_\_\_\_\_\_  Interest $\_\_\_\_\_\_\_\_\_\_\_\_  Insurance $\_\_\_\_\_\_\_\_\_\_\_\_  Rates $\_\_\_\_\_\_\_\_\_\_\_\_  Repairs & Maintenance $\_\_\_\_\_\_\_\_\_\_\_\_  Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| **Fixed Assets** |  |
| Provide a list of any assets purchased or sold during the year.  If you have sold or purchased a rental property during the year, please provide the settlement statement.  Please review last year’s Depreciation Schedule and advise any assets that no longer exist.  Is the Rental Property a new build? Yes/No |  |
| **Home Office Expenses** |  |
| Do you have an area set aside in your home for business purposes? Yes/No  If Yes, please supply:  Floor area of Office/Studio/Workshop sq m/feet \_\_\_\_\_\_\_\_  Floor area of House sq m/feet \_\_\_\_\_\_\_\_  Home Expenses for the year  Insurance (House only not contents) $\_\_\_\_\_\_\_\_\_\_\_\_  Mortgage Interest $\_\_\_\_\_\_\_\_\_\_\_\_  Power $\_\_\_\_\_\_\_\_\_\_\_\_  Rates/Rent $\_\_\_\_\_\_\_\_\_\_\_\_  Phone & Internet $\_\_\_\_\_\_\_\_\_\_\_\_  Repairs and Maintenance $\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| **Cash Income during the year not banked** |  |
| Supply details of any income received during the year that was not banked into the business accounts. |  |
| **Rental Expenses paid in cash/from personal account** |  |
| List any rental expenses paid from personal funds during the year. |  |
| **Motor Vehicle** |  |
| Kms travelled during the year to inspect/conduct property business.  \_\_\_\_\_\_\_\_\_\_\_\_\_\_km |  |
| **Finance** |  |
| Please provide details of any loans or mortgages raised during the year. |  |
| **Delivery of Financial Statements and Tax returns** |  |
| Indicate if you would like an electronic copy and/or a hard copy posted. (Please indicate the number of hard copies required)  Electronic Format (circle yes or no) Y/N  Hard Copies (number that you require) \_\_\_\_\_ |  |

**Thank you for completing this questionnaire. Please sign and return with your information.**

Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_