

Rental Questionnaire – 31 March 2024

Name	Phone
Address	Mobile
	Email

Bank Account number for Refunds

Information Required	Yes, No, N/A, Comment																						
Rent Received																							
<p>Either: A: Provide bank statements for all business accounts with the payments clearly detailed</p> <p>Or B: Provide a Summary of Rental Income and Expenses</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">Rent Received</td> <td style="width: 20%; text-align: right;">\$ _____</td> </tr> <tr> <td colspan="2"> </td> </tr> <tr> <td colspan="2"><u>Expenses</u></td> </tr> <tr> <td>Accounting</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Advertising</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Interest</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Insurance</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Rates</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Repairs & Maintenance</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Other _____</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>_____</td> <td style="text-align: right;">\$ _____</td> </tr> </table>	Rent Received	\$ _____	 		<u>Expenses</u>		Accounting	\$ _____	Advertising	\$ _____	Interest	\$ _____	Insurance	\$ _____	Rates	\$ _____	Repairs & Maintenance	\$ _____	Other _____	\$ _____	_____	\$ _____	
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Fixed Assets																							
<p>Provide a list of any assets purchased or sold during the year.</p> <p>If you have sold or purchased a rental property during the year, please provide the settlement statement.</p> <p>Please review last year's Depreciation Schedule and advise any assets that no longer exist.</p> <p>Is the Rental Property a new build? Yes/No</p>																							
Home Office Expenses																							
<p>Do you have an area set aside in your home for business purposes? Yes/No</p> <p>If Yes, please supply:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%;">Floor area of Office/Studio/Workshop</td> <td style="width: 60%;">sq m/feet _____</td> </tr> <tr> <td>Floor area of House</td> <td>sq m/feet _____</td> </tr> </table> <p><u>Home Expenses for the year</u></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">Insurance (House only not contents)</td> <td style="width: 20%; text-align: right;">\$ _____</td> </tr> <tr> <td>Mortgage Interest</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Power</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Rates/Rent</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Phone & Internet</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Repairs and Maintenance</td> <td style="text-align: right;">\$ _____</td> </tr> </table>	Floor area of Office/Studio/Workshop	sq m/feet _____	Floor area of House	sq m/feet _____	Insurance (House only not contents)	\$ _____	Mortgage Interest	\$ _____	Power	\$ _____	Rates/Rent	\$ _____	Phone & Internet	\$ _____	Repairs and Maintenance	\$ _____							
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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 _____