



**Rental Property Details**

Address of rental property: \_\_\_\_\_

Ownership (tick and complete):

I / We (own personally) – Name(s): \_\_\_\_\_

Company – Name: \_\_\_\_\_

Trust – Name: \_\_\_\_\_

Partnership – Name: \_\_\_\_\_

**Rental Income & Expenses**

- Tick the applicable source category or write a total or note in the final column.
- Leave any category blank if it does not apply.
- Important: If the rental is owned by a company or trust, we require all related bank statements and loan statements for the full year, even where a summary or total is provided below.

Category	Per Bank Statements	Per Invoice / Summary Attached	Specify Total or Add Note
Rental Income	<input type="checkbox"/>	(management summary attached) <input type="checkbox"/>	
Accountancy Fees <i>(not required if our service was used)</i>	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Advertising / Letting Fees	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Body Corporate Fees	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Insurance	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Interest (Loan)	<input type="checkbox"/>	(loan summary attached) <input type="checkbox"/>	
Legal Fees <i>(settlement statement required if property purchased during the year)</i>	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Property Management Fees	<input type="checkbox"/>	(management summary attached) <input type="checkbox"/>	
Rates	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	
Repairs & Maintenance (R&M)	<input type="checkbox"/>	(invoices attached) <input type="checkbox"/>	

Other (please specify details as needed)

**Short-Term Rental Use**

<p>Is this property used as a short-term rental (e.g. Airbnb)?</p> <p>If you selected No, continue to the next section. If you selected Yes, please answer below:</p> <p>Between 1 April 2025 and 31 March 2026, how many nights was the property listed as available to rent (and therefore not available for private use)?</p> <p>– If your property was listed year-round with no private use, write 365/365</p> <p>– If your property was listed for 200 nights and blocked out for private use the rest of the year, write 200/365</p>	<p><input type="checkbox"/> Yes   <input type="checkbox"/> No</p>          <p>_____ / 365 nights</p>
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**Fixed Assets / Chattels**

Please complete this section if any chattels (e.g. stove, heat pump, blinds) were purchased or sold during the year. Chattels already declared in prior years do not need to be listed — we will automatically include your depreciation claim for this year.

- No new chattels purchased or sold this year
- See attached valuation report
- See list below

Description	Date Purchased / Sold	Amount (sold in brackets)

**Home Office Claim**

If your rental property is not managed by a property manager and you have an area set aside for managing the rental, you are entitled to claim a percentage of your home expenses.

-Leave blank if not applicable.

Same area as last year (tick if unchanged)	<input type="checkbox"/>
Total floor area of home (m <sup>2</sup> )	
Area used for rental admin (m <sup>2</sup> )	

Expense Type	Amount
Insurance (house only) / Body Corporate Fees	
Power	
Mortgage Interest	
Rates	
Rent	
Repairs & Maintenance	
Phone & Internet	

**Motor Vehicle Claim**

If you travelled to the rental property during the year, you are entitled to claim a per-kilometre expense.

No travel to the rental property this year

Vehicle Type (tick one):  Petrol  Diesel  Hybrid  Electric

Total Kilometres Travelled for Rental Purposes: \_\_\_\_\_ km

Thank you for completing this questionnaire.  
Please sign and return it with your supporting information. By signing, you confirm that the information provided is true and correct to the best of your knowledge and that you are responsible for the accuracy and completeness of the information provided.

<b>Signature</b>		<b>Date</b>	
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