

# Rental Questionnaire - 2023

Client name: \_\_\_\_\_

Phone \_\_\_\_\_

Would you prefer your accounts be sent to you:  By e-mail  By post  
I authorise you to prepare my tax return from the information and records I have supplied to you. I accept responsibility for the accuracy and completeness of all records and information supplied to you. You are authorised to communicate with my/our bankers, solicitors, finance companies, and any other business that I/We deal with to obtain such information as you require in order to complete the above duties.

Signature.....Date.....

## Information required to complete your tax return

### 1. Property details

What is the address of your rental property:

1.....2.....

3.....4.....

If a property was not rented for a full 12 months, please provide the dates and details why it was vacant.

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### 2. Rental income and expenses. Please provide the following:

Bank Statements (identifying all rental property transactions) **and**

Property Management Company annual summary **or**

Cash Book (e.g. excel spreadsheet) **or**

Please provide details below:

**Income:**

Total Rent Received \$ \_\_\_\_\_

**Expenses:**

Rates \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Repairs and Maintenance (please attach details or invoices) \$ \_\_\_\_\_

Mortgage interest \$ \_\_\_\_\_

Tick if supplied


### Properties purchased before 27 March 2021

Some people may be able to claim 75% mortgage interest

To calculate these amounts, we **must** have a copy of loan statements from the bank showing weekly/fortnightly/monthly transactions from 1<sup>st</sup> April 2022 to 31<sup>st</sup> March 23)

Tick if supplied

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Details of any other expense relating to rental property:

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3. **Inspection Visits** Did you visit the property to inspect or do maintenance etc?

Date	Details e.g. inspection	Kilometres

4. **Other Details Required**

If you have any of the following please enclose them:

- Solicitors Settlement Statement
- Sale and Purchase Agreement
- Loan details for property purchased
- A copy of the latest Rateable Valuation
- A list of Chattels and their value for properties bought or sold during the year

***Thank you for completing this questionnaire.  
Please don't forget to sign the other side.***