



# Rental Annual Questionnaire - 2024

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

Phone: \_\_\_\_\_

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 bankers, solicitors, finance companies, and any other business that deal with to obtain such information as you require in order to complete the above duties.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Would you prefer your accounts to be sent to you:

By e-mail

By post

I'll collect

### Information required to complete your tax return:

**1 Property details**

Yes	No
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What is the address of your rental property(s):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**2 Vacant property**

Yes	No
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Was your property **not** rented for a full 12 months.  
If so please provide the dates and details why it was vacant.

\_\_\_\_\_

\_\_\_\_\_

**3 Rental income and expenses**

**Bank Statements** - We **must** have copies of your bank statements including the **31/3/24**.

Please provide any of the following that apply:

- Property management company's annual summary
- Cash Book (e.g. excel spreadsheet)
- Rates Invoices
- Insurance invoices
- Repairs & maintenance invoices
- Loan/Mortgage statements

Tick if supplied


Details of any other expense relating to the rental property:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**4 Inspection Visits**

Yes	No
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Did you visit the property to inspect or do maintenance etc?

Date Reason e.g. inspection

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**5 Sales, Purchases and Refinancing**

Yes	No
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If you have any of the following, please provide copies:

Tick if supplied

Solicitors Settlement Statement

Sale and Purchase Agreement

Loan details for property purchased

Copy of the latest Rateable Valuation

List of Chattels and their value for properties bought or sold during the year

Code of compliance for new properties


**6 Other details**

Yes	No
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Any other details that you feel might be relevant (such as the property rented to employees or a narrative regarding large repairs and maintenance expenses).

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