Rental Property Questionnaire – 2020

Client name:………………………………………….……………………………………………………

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| Property Details |  |
| Address of rental property:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | If property was not rented for a full 12 months, please provide details of why it was vacant **and the number of days vacant**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Number of days the property was used privately (by you, your family or associated persons, even if rent was charged) during the period |  |
| Number of days the property was rented out for less than 80% of the market rate to persons not associated to you |  |

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| Rental Income and Expenditure |  |
| Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties  **OR**  Please provide details of the following for each rental property. Use a separate sheet if necessary.   |  |  |  |  | | --- | --- | --- | --- | | **Income** |  |  |  | | Total rent received | $\_\_\_\_\_\_\_\_\_\_\_ |  |  | |  |  |  |  | | **Expenses** |  |  |  | | Accounting fees | $\_\_\_\_\_\_\_\_\_\_\_ | Phone | $\_\_\_\_\_\_\_\_\_\_\_ | | Advertising (to rent) | $\_\_\_\_\_\_\_\_\_\_\_ | Power | $\_\_\_\_\_\_\_\_\_\_\_ | | Bank fees | $\_\_\_\_\_\_\_\_\_\_\_ | Rates | $\_\_\_\_\_\_\_\_\_\_\_ | | Insurance | $\_\_\_\_\_\_\_\_\_\_\_ | (including regional council rates) |  | | Legal fees | $\_\_\_\_\_\_\_\_\_\_\_ | Repairs and Maintenance | $\_\_\_\_\_\_\_\_\_\_\_ | | Management fees | $\_\_\_\_\_\_\_\_\_\_\_ | (please attach details or invoices) |  | | Mortgage interest | $\_\_\_\_\_\_\_\_\_\_\_ | Valuation fees | $\_\_\_\_\_\_\_\_\_\_\_ | | (attach copy of loan summary/ statements from bank) |  | Water rates | $\_\_\_\_\_\_\_\_\_\_\_ |   **Details of any other expenses relating to rental property:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_  **Details of visits to inspect property/conduct property business:**   |  |  |  | | --- | --- | --- | | **Date** | **Details** | **Kilometres** | |  |  |  | |  |  |  | |  |  |  |   Please attach all relevant documentation, including property manager’s statements, and details of any assets purchased over $500 |  |

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| Home Office Expenses - relating to business / self-employed / shareholder employeesPlease note that this information only needs to be provided in one of your questionnaires | |
| If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:  Address of property:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |
| Power $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Insurance (Building & Contents) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Interest (House Mortgage) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Rates $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Repairs & Maintenance $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Rent paid $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Other $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Total $**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Business Area \_\_\_\_\_\_\_\_\_\_\_ M2  Total Area \_\_\_\_\_\_\_\_ M2 |

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| **Rental property sold, purchased or rental ceased during the financial year** | Yes  No |
| **If yes, please provide the following:**   * 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 * If ceased renting – date ceased \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |