Rental Property Questionnaire – 2021

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.

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| **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:**

|  |  |  |
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| **Date** | **Details** | **Kilometres** |
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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 employees Please 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 \_\_\_\_\_\_\_\_\_\_\_ M2Total 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 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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