

# Rental Property Questionnaire – 2024

Client name: .....

## 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

## 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 \$ \_\_\_\_\_

Advertising (to rent) \$ \_\_\_\_\_

Bank fees \$ \_\_\_\_\_

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

Legal fees \$ \_\_\_\_\_

Management fees \$ \_\_\_\_\_

Mortgage interest \$ \_\_\_\_\_  
(attach copy of loan summary/  
statements from bank)

Phone \$ \_\_\_\_\_

Power \$ \_\_\_\_\_

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

(including regional council rates)

Repairs and Maintenance \$ \_\_\_\_\_

(please attach details or invoices)

Valuation fees \$ \_\_\_\_\_

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 \$1,000

## 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)	\$ _____	Business Area	_____ M2
Interest (House Mortgage)	\$ _____		
Rates	\$ _____	Total Area	_____ M2
Repairs & Maintenance	\$ _____		
Rent paid	\$ _____		
Other	\$ _____		
<b>Total</b>	<b>\$ _____</b>		

## Rental property sold, purchased or rental ceased during the financial year

Yes  
 No

### If yes, please provide the following:

- Solicitor's settlement statement
- Sale and purchase agreement
- Loan details for property purchase
- 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 \_\_\_\_\_

## COVID-19 Support Payments

a) Did you receive a COVID-19 support payment (CSP) Yes  No

If so, how much \$ \_\_\_\_\_

Was this banked into your business account Yes  No

b) Did you receive any COVID-19 leave support Yes  No

If so, how much \$ \_\_\_\_\_

Was this banked into your business account Yes  No

c) Did you receive the Small Business Cashflow Loan (SBCS) Yes  No

If so, how much \$ \_\_\_\_\_

Was this banked into your business account Yes  No