

WBB 2020 Rental Questionnaire

Ensure this questionnaire is completed and included with your records and please don't forget to sign on the back.

Client Name	
Balance Date	31/03/2020

Property Details	
Please provide us with the addresses of any rental properties you have and a copy of the current leases. Address: _____ Address: _____ Address: _____	If a property was not rented for a full 12 months, please provide details of why it was vacant. _____ _____

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 expense relating to rental property: _____ \$ _____ _____ \$ _____		
Details of visits to inspect property/conduct property business:		
Date	Details	Kilometres
_____	_____	_____
_____	_____	_____
_____	_____	_____

Home Office Expenses (if applicable)

If part of your home is set aside principally for use as an office/workshop/storage area which is used by you in relation to your rental property, you **may** be able to claim a proportion of your home expenses against your rental income. Please provide the following details:

Area used for Business: _____ m²Total Area of House & Workshop: _____ m²

Power \$ _____

Insurance (Building & Contents) \$ _____

Interest (House Mortgage) \$ _____

Rates (including regional council rates) \$ _____

Repairs and maintenance \$ _____

Other \$ _____

Total \$ _____**Other Details Required (if applicable)**

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

Thank you for completing this questionnaire. Please sign below:

Signature _____

Date _____