

Rental Questionnaire – 31st March 2023

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Email:		Preferred questionnaire format:	<input type="checkbox"/> Paper <input type="checkbox"/> Email <input type="checkbox"/> E-document

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

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.	<input type="checkbox"/>												
Income: Total Rent Received \$ _____	<input type="checkbox"/>												
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: <table border="0"> <thead> <tr> <th>Date</th> <th>Details</th> <th>Kilometres</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> </tbody> </table>	Date	Details	Kilometres	_____	_____	_____	_____	_____	_____	_____	_____	_____	
Date	Details	Kilometres											
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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: _____ m ² Total Area of House & Workshop: _____ m ² Power \$ _____ Insurance (Building & Contents) \$ _____ Interest (House Mortgage) \$ _____ Rates (including regional council rates) \$ _____ Repairs and maintenance \$ _____ Other \$ _____	

Mixed Use Holiday Home (if applicable)		
Do you have a property (such as a holiday home that is used privately and also to derive income?)		<input type="checkbox"/>
Details of property _____		
Was the property empty for 62 days in the income year? If yes, please complete the following section so we can determine the amount of allowable deductions.		<input type="checkbox"/>
<u>Mixed Use Holiday Home – Information Required</u>		
The number of days the property was empty during the income year _____		
The number of days the property was used by family or associated persons* during the income year _____		
* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property		
If there is more than one tenant who used the property through the year, please attach details.		<input type="checkbox"/>
Name of tenant: _____		
Relationship to owner (if any): _____		
Amount of rent they paid: \$ _____		
Dates rented (From: To) _____		
Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):		<input type="checkbox"/>
Cost of advertising for tenants	\$ _____	
Mortgage interest	\$ _____	
Rates	\$ _____	
Insurance	\$ _____	
Repairs/maintenance for general wear and tear	\$ _____	
Other (please give details) _____		
Other Details Required (if applicable)		
• Solicitors Settlement Statement		<input type="checkbox"/>
• Sale and Purchase Agreement		<input type="checkbox"/>
• Loan details for property purchased		<input type="checkbox"/>
• A copy of the latest Rateable Valuation		<input type="checkbox"/>
• A list of chattels with their dates and value for properties bought or sold during the year		<input type="checkbox"/>

Thank you for completing this questionnaire. Don't forget to sign it.

To: WestNet Tax Accounting Limited

Terms of Engagement

We hereby instruct you to prepare our Taxation Returns for the 2023 year. I undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information. If any part of this document is not completed, WestNet Tax Accounting Ltd will assume that the required figure is nil or this question does not apply to my/our accounts. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the above assignments.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us however you are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

I/We also accept that all WestNet Tax Accounting Limited's accounts are due for payment within 10 working days following invoice date unless a prior arrangement exists. I/We accept that any collection costs you incur will be fully recoverable from me/us.

Signature _____ Date _____