

RENTAL PROPERTY QUESTIONNAIRE

(Not required for LAQC's Holding Rental Properties)

NAME _____ BALANCE DATE _____

DAYTIME CONTACT PHONE NO _____ HOME PHONE NO _____

E-MAIL ADDRESS _____ FAX NO _____

ACKNOWLEDGEMENT BY CLIENT

I accept responsibility for the accuracy and completeness of the information supplied below which is to be used in the preparation of my/our income tax returns.

CLIENT'S SIGNATURE: _____ DATE: _____

1. INCOME & EXPENSES

| <u>Rental Property - Address:</u> | (i) _____ | (ii) _____ |
|---|-----------|------------|
| Rent Received: | \$ _____ | \$ _____ |
| Mortgage Interest | \$ _____ | \$ _____ |
| Rates | \$ _____ | \$ _____ |
| Insurance on House & Contents | \$ _____ | \$ _____ |
| Repairs & Maintenance (list details overleaf) | \$ _____ | \$ _____ |
| Legal Expenses or Valuation Fees | \$ _____ | \$ _____ |
| Other expenses: _____ | \$ _____ | \$ _____ |
| _____ | \$ _____ | \$ _____ |
| <u>TOTAL</u> | \$ _____ | \$ _____ |

2. PURCHASE OF PROPERTY

If rental property purchased during the financial year please provide:

- (a) Copy of Solicitors Settlement Statement
- (b) Sale and Purchase Agreement
- (c) Valuation at purchase date

- Land \$ _____
- House \$ _____
- Chattels \$ _____
- TOTAL \$ _____

Purchase Price
(including legal fees)

\$ _____

(d) When was the property first available for renting? _____

(e) In what material is the house constructed eg weatherboard, brick etc. _____

3. SALE OF PROPERTY

If rental property was sold during the year please provide:

- A copy of Solicitors Settlement Statement
 - A copy of Sale/Purchase agreement
 - Original Purchase Date _____
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4. DATE RECEIVED _____ **by:** _____

(Kendons to complete)