

# Rental Property Checklist and Questionnaire - 2023 Tax Year

(please complete a separate checklist for each rental property)



CLIENT: \_\_\_\_\_

## PROPERTY DETAILS

Address of property:-	
If property was not rented for a full 12 months, please provide details of why it was vacant <b>and the number of days vacant.</b>	
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 property.

**OR**

Please provide details of the following:-

**Income**

Total rent received                    \$ \_\_\_\_\_

**Expenses**

Accounting fees                         \$ \_\_\_\_\_

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

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

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

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

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

Mortgage interest – Apr to Sep        \$ \_\_\_\_\_

Mortgage interest – Oct to Mar        \$ \_\_\_\_\_

*(attach copy of loan summary / statements from bank)*

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

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

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

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

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

*(including regional council rates)*

Repairs & Maintenance \$ \_\_\_\_\_

*(please attach details or invoices)*

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)*

**RENTAL PROPERTY SOLD, PURCHASED OR RENTAL CEASED DURING THE FINANCIAL YEAR**

Does this apply to you?      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 \_\_\_\_\_