

RENTAL QUESTIONNAIRE

NAME: **FINANCIAL YEAR ENDED:**

RENTAL INFORMATION REQUIRED FOR TAX RETURNS

<p>1. Rental Income & Expenses</p>	<p>Please supply sufficient documentation (either bank statements, and/or real estate statements, and/or cashbooks) to allow your rental statement to be prepared. Information supplied should cover the following:</p> <p>Rental Income for the year</p> <p>Expenses:</p> <p>Rates</p> <p>Insurance</p> <p>Interest on Mortgages (Please see note 2)</p> <p>Repairs & Maintenance (Please supply summary of these expenses)</p> <p>Vehicle Expenses (Where claiming on kilometer basis please supply summary of your trips and the mileage. If your kilometers are over 5,000, you MUST keep a logbook.)</p> <p>Other Expenses (Please supply summary of these)</p> <p>Home Office Claim (discuss any claim)</p>	
<p>2. Mortgages</p>	<p>Please supply details of loan – either a loan summary, or a bank printout, or bank loan statements showing transactions during the year, and the closing balance as at your balance date.</p>	
<p>3. Sale and Purchase</p>	<p>Did you buy or sell a rental property during the year?</p> <p>If yes, please supply the legal documentation relating to this transaction.</p>	<p>YES / NO</p>
<p>4. Chattel Sale & Purchases</p>	<p>Did you purchase, sell or trade any chattels during the year?</p> <p>Please supply full details of these transactions. (Please supply invoices where possible)</p>	<p>YES / NO</p>
<p>5. Other</p>	<p>Any other information you consider relevant:</p>	
<p>6. Company</p>	<p>If your rental is owned by a company, please advise any changes of your company directors and/or shareholders.</p>	

7. Instructions / Authorisation for BTA Ltd

I instruct BTA Ltd to prepare my taxation return. I undertake to supply all information necessary for this engagement and to be responsible for the accuracy and completeness of such information. Your services are not intended to and accordingly will not result in the expression by you of an opinion on the tax return summary or related schedules insofar as third parties are concerned.

Authorisation to obtain information subject to the Privacy Act

I authorise BTA Ltd to communicate with the appropriate bankers, solicitors, finance companies and other persons or organisations to obtain such further information as is required to carry out the above engagement.

Signature _____ Date _____
(Please sign here)