

RENTAL QUESTIONNAIRE

NAME: **FINANCIAL YEAR ENDED:**

RENTAL INFORMATION REQUIRED FOR TAX RETURNS

1. Rental Income & Expenses	<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 style="padding-left: 20px;">Rates</p> <p style="padding-left: 20px;">Insurance</p> <p style="padding-left: 20px;">Interest on Mortgages (Please see note 2)</p> <p style="padding-left: 20px;">Repairs & Maintenance (Please supply summary of these expenses)</p> <p style="padding-left: 20px;">Vehicle Expenses (Where claiming on kilometre basis please supply summary of your trips and the mileage.)</p> <p style="padding-left: 20px;">Other Expenses (Please supply summary of these)</p> <p style="padding-left: 20px;">Home Office Claim (discuss any claim)</p>	
2. Mortgages	<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>	
3. Sale and Purchase	<p>Did you buy or sell a rental property or chattels during the year?</p> <p>If yes, please supply the documentation (legal or invoices) relating to these transactions.</p>	YES / NO
4. Refund Bank Account	<p>Please provide the bank account name and number that should there be a refund you would like it to be deposited into</p> <p>Bank account number.....</p> <p>Bank account name.....</p>	
5. Other	<p>Any other information you consider relevant:</p>	
6. Company	<p>If your rental is owned by a company, please advise any changes of your company directors and/or shareholders.</p>	

6. 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 _____