

# Rental Questionnaire – 31 March 2011

Ensure this questionnaire is completed and included with your records

Client Name	[Client Name]	Phone:	Business or Home] [Mobile]
Balance Date	31 March 2011	Fax:	[Business Fax]
		Email:	[E-mail]

To: [Firm Name]

## Terms of Engagement

We hereby instruct you to prepare our Taxation Returns for the 2011 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. 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 also accept that Beanies On The Run Limited has the right to charge interest on overdue accounts at the rate of 2.0% per month, and that all accounts are due for payment 7 days following invoice date. The charging of such interest will be at the discretion of Beanies On The Run Limited. I/We accept that any collection costs incurred by Beanies On The Run Limited will be fully recoverable from me/us.

Signature \_\_\_\_\_ Date \_\_\_\_\_

<b>Property Details</b>	
Please provide us with the addresses of any rental properties you have.  1. Address: _____  2. Address: _____  3. Address: _____	If a property was not rented for a full 12 months, please provide details of why it was vacant.  _____  _____

Rental Income and Expenditure		✓
Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties		<input type="checkbox"/>
<b>OR</b>		
Please provide details of the following for each rental property. Use a separate sheet if necessary.		
<b>Income:</b>		<input type="checkbox"/>
Total Rent Received	\$ _____	
<b>Expenses:</b>		
Rates	\$ _____	
Insurance	\$ _____	
Repairs and Maintenance (please attach details or invoices)	\$ _____	
Mortgage Interest (attach copy of loan summary/statements from bank)	\$ _____	
Details of any other expense relating to rental property:		
_____	\$ _____	
_____	\$ _____	
Details of visits to inspect property/conduct property business:		
Date	Details	Kilometres
_____	_____	_____
_____	_____	_____
_____	_____	_____

## Home Office Expenses

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:

Business Area: \_\_\_\_\_ m<sup>2</sup>

Total Area: \_\_\_\_\_ m<sup>2</sup>

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

Insurance (Building &amp; Contents) \$\_\_\_\_\_

Interest (House Mortgage) \$\_\_\_\_\_

Rates	\$
-------	----

Repairs &amp; Maintenance \$\_\_\_\_\_

Other	\$
-------	----

Total \$

Cost of House and Section \$

Cost of Section	\$
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Construction materials: (timber, brick, etc)

### Other Details Required

- 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

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