

Rental Questionnaire – 31 March 2010

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2010	Fax:	
		Email:	

To: Naylor Lawrence & Associates Limited

Terms of Engagement

We hereby instruct you to prepare our Taxation Returns for the 2010 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. All other terms and conditions of this engagement are the same as those referred to in the original Engagement Letter I/we signed when I/we became a client.

You are hereby authorised to communicate with my/our bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to complete the above assignments.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us.

Signature _____ Date _____

Property Details	
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"/>
OR		<input type="checkbox"/>
Please provide details of the following for each rental property. Use a separate sheet if necessary.		
Income:		<input type="checkbox"/>
Total Rent Received	\$ _____	
Expenses:		
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	
<p>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:</p> <p>Area used for Business: _____ m²</p> <p>Total Area of House & Workshop: _____ m²</p> <p>Power \$ _____</p> <p>Insurance (Building & Contents) \$ _____</p> <p>Interest (House Mortgage) \$ _____</p> <p>Rates \$ _____</p> <p>Repairs & Maintenance \$ _____</p> <p>Other \$ _____</p> <p>Total \$ _____</p> <p>Cost of House and Section \$ _____</p> <p>Cost of Section \$ _____</p> <p>Construction materials: (timber, brick, etc)</p> <p>_____</p>	<input type="checkbox"/>
Other Details Required	
<ul style="list-style-type: none"> • 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 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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