



smart business centre
Not Your Ordinary Accountants

Rental Questionnaire

This questionnaire is for Commercial & Residential Rentals

NAME _____

ADDRESS _____

PHONE NUMBER _____

EMAIL _____

This email address will be used for all tax returns, invoices, tax notifications, and communication.

The following questions collect the information we require to complete the tax return. Please provide as much information as possible. By submitting this form, you are confirming that all information supplied by you is complete and correct at the time of submission. We will utilise the information provided to complete your financial statements and/or tax returns.

RENTAL PROPERTY INFORMATION

Address of rental property _____

Was the tenancy period a full year? Part Year Full Year

Part-year From / To: _____

RENTAL MANAGEMENT

Is the property managed by a Rental Agency?

No Yes

If yes, please provide the name of the property manager & Rental agency _____

Please provide all receipts of fees and other expenses paid on your behalf.

RENTAL INCOME

Please supply income received for the financial year 1 April - 31 March

Please supply bank statements to show all rental income and expenses.

Please supply information on mortgage loan statements, opening/closing loan balances, interest incurred, and payments made.

ASSETS PURCHASED OR SOLD

Have you purchased, sold, disposed of, or traded in an asset, (with a value of more than \$1,000.00) at this rental for period 1 April - 31 March.

No Yes

If yes, please attach receipts \$ _____

LEGAL FEES

Were there any legal expenses in relation to the rental property for the financial year 1 April - 31 March?

No Yes

If yes, please attach receipts \$ _____

RENTAL EXPENSES

Did you incur any rental expenses for the financial year 1 April - 31 March.

No Yes

If yes, please attach receipts \$ _____

HOME OFFICE CALCULATION

Do you have an area at the residential address you are using as an office or for storage?

No Yes

Percentage to claim

For us to accurately calculate your home Office claim, we need to know the measurement of the area used as an office or for storage in relation to the total residential building's measurement.

- the area used should NOT include your toilet/bathroom, kitchen, etc. (unless specifically available for use by your customers): and

- the area used can include storage areas if you are storing items, documents, equipment, and tools used for your business.

Area used for business (m2)	Area of residential buildings (m2)
Rates (including Water) per year	Power per year
House/Contents Insurance per year	Repairs (on home office area)
Rent payments (if property not owned)	Mortgage Interest per year (do not include principal portion)
Telephone & Internet	Other (please specify)

MEETING

Would you like a meeting to discuss your financial statements once they have been completed?

No Yes