

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 and when it was vacant. _____ _____

Rental Income and Expenditure																
Where you use Xero or Dennis O'Grady Ltd assists with the management of your rental properties please provide a final Bank statement for the year ended 31 March for all bank accounts <p style="text-align: center;">Or</p> If you use a separate bank account to manage your rental income please provide a bank download for the year 1 April – 31 March (QIF/ OFX) from your account. Please contact our office if you need assistance. Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties	✓															
Details of visits to inspect property/conduct property business. Use a separate sheet if necessary: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Date</th> <th style="width: 70%;">Details</th> <th style="width: 20%;">Kilometres</th> </tr> </thead> <tbody> <tr><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td><td>_____</td></tr> </tbody> </table>	Date	Details	Kilometres	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	
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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: Area used for Business: _____ m ² Total Area of House & Workshop: _____ m ² <table style="width: 100%;"> <tr><td>Power</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Insurance (Building & Contents)</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Interest (House Mortgage)</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Internet</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Rates</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Repairs & Maintenance</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Telephone – Mobile</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Telephone – Land line</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Other</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Total</td><td style="text-align: right;">\$ _____</td></tr> </table>	Power	\$ _____	Insurance (Building & Contents)	\$ _____	Interest (House Mortgage)	\$ _____	Internet	\$ _____	Rates	\$ _____	Repairs & Maintenance	\$ _____	Telephone – Mobile	\$ _____	Telephone – Land line	\$ _____	Other	\$ _____	Total	\$ _____	
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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 																					

Capital Expenditure		
<p>Attach details of assets purchased or sold during the year such as motor vehicles, plant and equipment and properties. Where applicable please provide the following details:</p> <ul style="list-style-type: none"> ▪ Hire purchase or loan agreements ▪ Lease agreements ▪ All legal statements and agreements ▪ Trade-in details ▪ Lost, stolen or scrapped items ▪ Copy of Tax Invoices 		
Legal and Loan Documents		
<p>Please attach any solicitor's statements and Sale and Purchase Agreements relating to any legal transactions during the year. Please also include statements and agreements relating to any mortgages, hire purchase, leases or loans. Please include a copy of your latest Rateable Valuation for any properties you own.</p>		
Business Expenses		
<p>There are a number of invoices that we specifically require. Please ensure the records you provide us with include all paid accounts for:</p> <ul style="list-style-type: none"> ▪ Insurance premiums ▪ ACC payments and arrangements 		

**Thank you for completing this questionnaire
Don't forget to sign an Authority to Act**