

Client Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

## 2019 Rental Questionnaire

Please complete this questionnaire, sign and return with your records.

To speed up the compilation of your financial statements (and keep cost down) please complete the following questions. All questions relate to the **year ending 31/03/2019**. Please return this questionnaire to us along with the required documents.

### Rental Property Questions

Please enter the following information about your property rental(s):

No.	Address	Rental per week	Weeks available for rent	Weeks tenanted
1				
2				
3				
4				

In order to complete your accounts, any rental expenses and income will need to be clearly identified in your records. Records could be bank statements, cashbook, invoices or computerised records. What main source of information will you be providing to us? Please specify:

Did you purchase or sell any properties during the period?  Yes  No

If yes, provide the sale and purchase agreement along with any related statements and details such as legal costs, valuations and financing details:

Do you have any loans/mortgages on your rental properties?  Yes  No

If yes, please provide loan statements for the period including a breakdown of any interest costs incurred:

Please provide details of any expenses relating to the property eg. rates, insurance, property management, advertising, repairs & maintenance.

Have any of the investment properties you own been brought with the intention of development or resale?  Yes  No

Are you in any way associated<sup>1</sup> with a land dealer, builder or developer?  Yes  No

Is there any other information that you consider relevant to the preparation of your rental accounts?  Yes  No

If yes, please enter details below and attach any supporting documents:

<sup>1</sup>There are a number of tests that define an association. An association can be as follows: two companies; a company and a person other than a company; two relatives; a person and a trustee for a relative; a trustee and a beneficiary; trustees with a common settlor; a trustee and a settlor; a settlor and a beneficiary; a trustee and a person with the power of appointment or removal of the trustee; a partnership and a partner; and two persons who are each associated with the same third person (tripartite test). Where you are unsure if an association exists please contact us for advice.