

2026 Rental Questionnaire

Name: Client Code:

Please provide the following information

for period 1 April 2025 to 31 March 2026

Rental income

- Bank statements
- Rental summary if you use a property management company
- How long the property was rented out / available for rent

Rental Expenses

- Rates and insurance
- Mortgage interest
- Property management fees
- Repairs and maintenance
- Motor vehicle and travel expenses
- Details of improvements made to the property
- Legal fees in relation to the property

Documents related to the sale or purchase of property

- Solicitor settlement statement
- Signed sell and purchase agreement
- Chattel valuation documents
- Registered valuation if applicable

Declaration

I accept responsibility for the accuracy and completeness of the information supplied in this questionnaire which is to be used in the calculation of my income from my property rental activities. You are not to complete an audit, nor do I wish to undertake a detailed review of my affairs in order to substantiate the accuracy of my information, and therefore you are not asked to provide any assurance on my financial statement. I understand your work can not be relied on to detect error and fraud and that you accept no liability for the accuracy and completeness of the information supplied by me. I further understand that the financial statements will be prepared at my request and for my purposes only and that you will not be liable for any losses, claims or demands by any third person. I also accept responsibility for all other records and information supplied to you other than those listed above. I accept responsibility for any failure by me to supply all relevant records and information to you.

Prepared By:

..... Full Name

Designation:

..... Designation

Signature:

..... Signature

Date:

..... Date