

Rental Income Questionnaire

This checklist is appropriate for Property Investors who receive rental income.

Instructions: Please provide bank statements in Excel or CSV format for the period **1 April to 31 March (inclusive)**.

Additionally, if any of the income or expenses listed below have not been processed through your rental bank account, please supply the relevant details and supporting information for those transactions.

Address of property:

Income
<ul style="list-style-type: none"> - Rental income received - Cash contribution received from bank
Expenses
<ul style="list-style-type: none"> - Accounting fees - Advertising costs - Bank fees - Body Corporate fees - Depreciation schedule of chattels - Insurance – House, mortgage repayment, landlord insurance - Interest on mortgage – provide mortgage statement including home loan balance as at 31 March - Lawn mowing - Legal fees - Mileage expenses relating to property inspections and confirm type of vehicle used i.e. petrol, diesel, electric, hybrid - Property management statement for the year - Rates - Repairs and maintenance - Rubbish disposal - Valuation costs - Water charges
Provide copies of sale and purchase agreements and solicitor’s settlement statements if you purchased or sold any properties during the year
Other expenses/income not mentioned above
Bank account balances as at 31 March for rental property accounts