

KGA 2024 Rental Questionnaire

Client Name		Balance Date	31 March 2024
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To KGA Chartered Accountants Limited

In signing this you acknowledge that you have

1. Read and accepted our Terms of Engagement
2. Provided all relevant information needed for the tax return of the above entity to be accurately completed.

Signature _____

Date _____

Property Details - Please complete a separate questionnaire for each property	
Please provide us with the address of the rental property. Address: _____ _____ _____	If a property was not rented for a full 12 months, please provide details of why it was vacant. _____ _____ _____

Rental Income and Expenditure			
Please provide Bank Statements or provide the following details: (Note: If you have a property manager, please provide us with the Rental Summary from your management company for the year). If you have more than 1 rental property, please complete rental questionnaires for each.			
Income:			
Gross Rent Received	\$	_____	
Expenses:			
Advertising (to rent)	\$	_____	Power \$ _____
Bank fees	\$	_____	Rates \$ _____
Insurance	\$	_____	Repairs and Maintenance over \$1,000 \$ _____
Legal fees	\$	_____	Assets Purchased \$ _____
Management fees	\$	_____	(Items over \$1,000 - please attach invoice)
Mortgage Interest	\$	_____	Valuation fees \$ _____
Phone	\$	_____	Water rates \$ _____
Do you have any other expenses relating to this rental property?			
_____			\$ _____
_____			\$ _____
Do you have any other comments relating to this Rental Property?			

If a rental property was purchased or sold during the year, please provide us with Sale and Purchase agreement, Settlement Statement and Statement of Accounts received from your lawyer. Please note that if the property was owned for less than 10 years, you might be liable for Capital Gains Tax. (Note: 5 years prior to 2023 FYR)

Home Office Expenses (if applicable)

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:

Total Area of House	_____ m ²
Business Office / Storage Area	_____ m ²
Garage Area	_____ m ²
Power	\$ _____
Interest (House Mortgage)	\$ _____
Insurance (House)	\$ _____
Insurance (Contents)	\$ _____
Rates (including regional council rates)	\$ _____
Repairs and maintenance	\$ _____
Telephone (If not yet claimed)	\$ _____
Internet (If not yet claimed)	\$ _____
Other	\$ _____
Total	\$ _____

Other Details Required (if applicable)

- Solicitors Settlement Statement
- Sale and Purchase Agreement
- Loan details for property purchased
- A copy of the latest Rateable Valuation
- A list of chattels with their dates and value for properties bought or sold during the year

Thank you for completing this questionnaire.