

Midgley Partners – Questionnaire Income & Taxes

RENTAL INFORMATION CHECKLIST 2014

Client Name: _____

WP/P

Balance Date: 31 March 2014

Address of rental property _____
(Please use a separate page for each property)

1) Rental Income

Number of months for which the property was available to let

months

Total Rent Received

\$

2) Rental Expenses

Mortgage interest paid

\$

Rates

\$

Insurance

\$

Stamps, Stationery, Consumables

\$

Management Fees (if applicable)

\$

Repairs & Maintenance (please list items separately)

\$

Capital Improvements (please list items separately)

\$

Other expenses (please list items separately)

\$

3) Motor Vehicles (Inspection of rental property)

Km's from home to rental property

_____ km

No. of trips per annum

4) Sale / Purchase of Assets / Property

+ Did you sell, purchase any properties or assets or stop using a property as a rental investment in the past year?

Yes / No

+ If yes, please provide documentation such as Solicitor Settlement Statements for the sale or purchase, and/or valuation of the property.

Yes / No

5) "Dual Use Asset"

Is your property used for both Renting & Living in?

Yes / No

If yes we will contact you for additional Info.

6) Valuation

Have you received an updated Rateable Value for any land and buildings owned or any independent valuation of assets completed in the past year? Details Please

Yes / No

7) Earthquake Issues?

Any Payout this year?

Yes / No

Thank you for your efforts

Midgley Partners
March 2014

Client Signature

RENTAL 2014