

Midgley Partners – Questionnaire Income & Taxes

RENTAL INFORMATION CHECKLIST 2015

WP/P

Client Name: _____

Tax Year End: 31 March 2015

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

\$ _____

Interest (attach copy of Loan Summary)

\$ _____

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 Vehicle (Inspection of rental property)

Km's from home to rental property

_____ km

No. of trips per annum

**4) Sale / Purchase: - Property
- Assets**

+ 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?
 If yes we will contact you for additional Info.

Yes / No

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 2015

 Client Signature

 Date

RENTAL 2015