

Lockhart O'Shea Ltd.

RENTAL / PROPERTY QUESTIONNAIRE

Please list below your rental property addresses:

Address:

Address:

Address:

If a property was not rented for a full 12 months, please provide details of why it was vacant.

Rental property purchased or sold during the financial year – (if applicable - please provide the following information)	Yes	No
• Solicitors Settlement Statement(s)		
• Sale and Purchase Agreement		
• Loan details for property purchased		
• Valuation of chattels (if undertaken)		

Residential Property Sales	
Have you sold any residential property that was not your family home during the year (not otherwise detailed on the information provided)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, when was the property purchased?	Date:
• what was the original purchase price?	\$
• and the sale price?	\$
• Has the property been used as your main home at any point?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Rental Income and Expenditure			
Please supply the year end tax summary if the property/ies have been managed for the full year by a property manager or bank statements clearly identifying and detailing all transactions that relate to the rental properties.			
OR			
Please provide details of the following for each rental property. Use a separate sheet if necessary.			
Income:			
Total Rent Received	\$		
Expenses:			
Accounting fees	\$	Phone	\$
Advertising (to rent)	\$	Power	\$
Bank fees	\$	Rates	\$
Insurance	\$	(including regional council rates)	
Legal fees	\$	Repairs and Maintenance	\$
Management fees	\$	(please attach details or invoices)	
Mortgage Interest	\$	Valuation fees	\$

Mixed Use Holiday Home

Are any of your rental properties a holiday home or a bach that is used privately and also to derive income? Yes No

If yes, provide details of property:

Was the property empty for 62 days in the income year? Yes No

If yes, please complete the following section so we can determine the amount of allowable deductions.

Mixed Use Holiday Home – Information Required

The number of days the property was empty during the income year

The number of days the asset was used by family or associated persons* during the income year.

OR where income from any person received was less than 80% of market rate

* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property.

If there is more than one tenant who used the property through the year, please attach details.

Name of tenant:

Relationship to owner (if any):

Amount of rent they paid: \$

Dates rented (From: To)

Mixed Use Holiday Home conts.

Expenses incurred in respect of the property:

Cost of advertising for tenants \$

Cost of repairing damages caused by tenants \$

Number of days spent in the property while repairing damages caused by tenants \$

Mortgage interest \$

Rates \$

Insurance \$

Repairs/maintenance for general wear and tear \$

Other (please give details):

Mixed Use Boat or Plane

Does this entity have a boat, plane or helicopter (with a market value of \$50,000 or greater), that is used privately and also to derive income? Yes No