



Client: _____

Contact Phone No: _____

Email Address: _____

INFORMATION REQUIRED FOR 2023 MIXED USE HOLIDAY HOME

Address of Property _____

Is your holiday home used privately and also to derive income? YES / NO

Was the property empty for 62 days or more in the income year? YES / NO

If yes, please complete the following section.

The number of nights rented out at market value _____

The number of nights rented out to close relatives or used privately _____

The number of nights rented out at less than 80% of market value _____

The number of nights the property was vacant _____

The number of nights personally used to carry out repairs on the property _____

Please provide the following income and expense information. If the property is managed by a third party, please also provide their monthly statements for the year.

INCOME \$
 Total Rental Income _____

EXPENSES \$

Advertising _____

Agent's/Management Fees _____

Bank Charges _____

Insurance _____

Legal Expenses _____

Interest (Please provide monthly breakdown) _____

Power _____

Rates _____

Repairs & Maintenance _____

Travel Costs (number of kms travelled to manage/maintain property) _____

Type of Vehicle: Petrol or Diesel Petrol Hybrid Electric

Other Expenses (Specify) _____

I authorise you to prepare Financial Statements from the information and records I have supplied to you. I advise you not to complete an audit or review. I accept responsibility for the accuracy and completeness of all records and information supplied to you.

Information and Signing Authorisation

I authorise Helston & Associates Limited to obtain any information and sign any Returns on my behalf, regarding my tax affairs.

Name:..... Signed:

Date: