



**Client:** \_\_\_\_\_

**Contact Phone No:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**INFORMATION REQUIRED TO PREPARE YOUR RENTAL SCHEDULES 2023**

Address of Property \_\_\_\_\_

**INCOME** \$  
 Total Rental Income \_\_\_\_\_

**EXPENSES** \$

Accounting Fees \_\_\_\_\_

Advertising \_\_\_\_\_

Agent's/Management Fees \_\_\_\_\_

Bank Charges \_\_\_\_\_

Insurance \_\_\_\_\_

Legal Expenses \_\_\_\_\_

Interest (Please provide monthly breakdown) \_\_\_\_\_

Power \_\_\_\_\_

Travel Costs (state no. of kms) \_\_\_\_\_ kms

Type of Vehicle:                      Petrol or Diesel                       Petrol Hybrid                       Electric

Rates \_\_\_\_\_

Repairs & Maintenance \_\_\_\_\_

Other (Specify) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**New Assets Purchased**

Please list each item and date purchased

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**PURCHASE OF NEW RENTAL PROPERTY**

Property Address: \_\_\_\_\_

Date Purchased: \_\_\_\_\_ Purchase Price: \$ \_\_\_\_\_

Date available for rental: \_\_\_\_\_

**Please supply:**

- Sale and purchase agreement
- Details of expenses incurred to make property available for rental
- Valuation of property if one was obtained (or rates demand)
- Valuation of chattels, if available
- Solicitor's statements for purchase
- Solicitor's fee invoice

**SALE OF RENTAL PROPERTY (If sold in this tax year)**

Property Address: \_\_\_\_\_

Date of Sale: \_\_\_\_\_ Selling Price: \$ \_\_\_\_\_

**Please supply:**

- Sale and purchase agreement
- Solicitor's settlement statements
- Solicitor's fee invoice

*I ask that you sign the information authority below and return this questionnaire with your information to my office as it is getting increasingly difficult with the Privacy Act to obtain information from any source without authorisation.*

Phillip J Blacktopp  
**ACCOUNTANT**

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: \_\_\_\_\_