



Client: _____

Contact Phone No: _____

Email Address: _____

INFORMATION REQUIRED TO PREPARE YOUR RENTAL SCHEDULES 2024

Address of Property _____

INCOME

\$

Total Rental Income

EXPENSES

\$

Accounting Fees

Advertising

Agent's/Management Fees

Bank Charges

Insurance

Legal Expenses

Interest

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 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: