

Rental Questionnaire – 2017

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	Business : Cellular:
Balance Date		Fax:	
		Email:	

Terms of Engagement

We hereby instruct Lawson Avery Ltd to prepare our Taxation Returns for the 2017 year. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the above assignments.

I/We also accept that you have the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I/We accept that any collection costs you incur will be fully recoverable from me/us.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us however you are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

Signature _____ Date _____

Property Details	
Please provide us with the addresses of any rental properties you have. 1. Address: _____ 2. Address: _____ 3. Address: _____	If a property was not rented for a full 12 months, please provide details of why it was vacant. _____ _____

Rental Income and Expenditure		✓
Please supply 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.		<input type="checkbox"/> <input type="checkbox"/>
Income: Total Rent Received \$ _____ Expenses: Rates \$ _____ Insurance \$ _____ Repairs and Maintenance (please attach details or invoices) \$ _____ Mortgage Interest (attach copy of loan summary/statements from bank) \$ _____ Details of any other expense relating to rental property: _____ \$ _____ _____ \$ _____ Details of visits to inspect property/conduct property business: Date Details Kilometres _____ _____ _____		

Other Details Required	
<ul style="list-style-type: none"> Solicitors Settlement Statement Sale and Purchase Agreement Loan details for property purchased A copy of the latest Rateable Valuation A list of chattels and their value for properties bought or sold during the year 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Thank you for completing this questionnaire
Don't forget to sign it