



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

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

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

**INFORMATION REQUIRED TO PREPARE YOUR RENTAL SCHEDULES 2025**

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

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**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

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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:.....