



# Self-Assessment Checklist – Property Rental

Client Name: \_\_\_\_\_

*Please fill this sheet in and return it along with your supporting documentation & information.*

## Property Info

Address of the Property: \_\_\_\_\_

Date you started to let the property out: \_\_\_\_\_

Is the property owned (please circle relevant option)

- 50/50 with spouse/partner
- Just by you
- Other (please provide detail)

## Rental Income (any of these are fine)

- Copies of Management Agency statements/invoices
- Copy of bank statement showing income
- An email telling me how much you bring in each month

## Agency Costs

- Management agency statements / invoices
- Bills they have paid on your behalf

## Expenses relating solely to the rental property

- Bills you have paid (utilities, council tax etc)
- Decorating Costs
- Repairs/maintenance work
- DIY you have done (materials purchased etc)
- Updated / replaced items
  - I need the amount and a brief explanation of why it was updated or replaced)
- Visits made to the property
  - If you are using an agent, you can only claim mileage from the agent address to the property
- Mortgage Interest paid – you will need to get a mortgage interest statement from your lender
- Landlord Insurance
- Anything else you can think of