

# Rental Questionnaire – 31 March 2019

Ensure this questionnaire is completed and included with your records

Client Name		Client ID:	
Phone		Balance Date:	31 March 2019
Email:			

To: Prior Blackburn Limited

## Terms of Engagement

I/we hereby instruct you to prepare our Taxation Returns for the 31<sup>st</sup> March 2019 year. I/we 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/our bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to complete the above assignments. I/we authorise you to obtain information from Inland Revenue about all tax types except child support (NCP or CPR) in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels.

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.

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 20<sup>th</sup> 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.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Property Details		
Please provide us with the addresses of any rental properties you have.		If a property was not rented for a full 12 months, please provide details of why it was vacant.  _____ _____
Address: _____		
Address: _____		
Address: _____		
Rental Income and Expenditure		✓
Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties <b>OR</b> Please provide details of the following for each rental property. Use a separate sheet if necessary.		<input type="checkbox"/>
<b>Income:</b>		<input type="checkbox"/>
Total Rent Received \$ _____		
<b>Expenses:</b>		
Accounting fees \$ _____	Phone \$ _____	
Advertising (to rent) \$ _____	Power \$ _____	
Bank fees \$ _____	Rates \$ _____	
Insurance \$ _____	(including regional council rates)	
Legal fees \$ _____	Repairs and Maintenance \$ _____	
Management fees \$ _____	(please attach details or invoices)	
Mortgage Interest \$ _____	Valuation fees \$ _____	
(attach copy of loan summary/statements from bank)	Water rates \$ _____	
Details of any other expense relating to rental property:		
_____	\$ _____	
_____	\$ _____	

Details of visits to inspect property/conduct property business:		
Date	Details	Kilometres
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Home Office Expenses (if applicable)**

If part of your home is set aside principally for use as an office/workshop/storage area which is used by you in relation to your rental property, you *may* be able to claim a proportion of your home expenses against your rental income. Please provide the following details:

Area used for Business: \_\_\_\_\_ m<sup>2</sup>

Total Area of House & Workshop: \_\_\_\_\_ m<sup>2</sup>

Power \$ \_\_\_\_\_

Insurance (Building & Contents) \$ \_\_\_\_\_

Interest (House Mortgage) \$ \_\_\_\_\_

Rates (including regional council rates) \$ \_\_\_\_\_

Repairs and maintenance \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

**Total** \$ \_\_\_\_\_

Cost of House and Section \$ \_\_\_\_\_

Cost of Section \$ \_\_\_\_\_

Construction materials: (timber, brick, etc)

\_\_\_\_\_

**Residential Land Withholding Tax**

Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? If so, provide details e.g. IR1100 Residential land withholding tax return and other sale and purchase documents.

**Residential Property Sales**

Have you sold any residential property during the year (not otherwise detailed on the information provided)?

If yes, when was the property purchased?

If it was purchased with 5 years of the sale date,

- what was the original purchase price
- and the sale price?

\$ \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Mixed Use Holiday Home

Does this entity have a property (such as a holiday home or a bach) that is used privately and also to derive income?

Yes  No

If yes, provide details of property: \_\_\_\_\_

Was the property empty for 62 days in the income year? Yes  No

If yes, please complete the following section so we can determine the amount of allowable deductions.

#### Mixed Use Holiday Home – Information Required

The number of days the property was empty during the income year \_\_\_\_\_

The number of days the asset was used by family or associated persons\* during the income year \_\_\_\_\_

OR where income from any person received was less than 80% of market rate \_\_\_\_\_

\* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property

If there is more than one tenant who used the property through the year, please attach details.

Name of tenant: \_\_\_\_\_

Relationship to owner (if any): \_\_\_\_\_

Amount of rent they paid: \$ \_\_\_\_\_

Dates rented (From: To) \_\_\_\_\_

Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):

Cost of advertising for tenants \$ \_\_\_\_\_

Cost of repairing damages caused by tenants \$ \_\_\_\_\_

Number of days spent in the property while repairing damages caused by tenants \_\_\_\_\_

Mortgage interest \$ \_\_\_\_\_

Rates \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Repairs/maintenance for general wear and tear \$ \_\_\_\_\_

Other (please give details) : \_\_\_\_\_

