

# Rental Questionnaire – 31<sup>st</sup> March 2018

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Fax:	
		Email:	

To: Bishop Toomey & Pfeifer Limited

## **Terms of Engagement**

I/we hereby instruct you to prepare our Taxation Returns for the 2018 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 14 days 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.

Name	IRD Number	Signature	Date

<b>Property Details</b> Please provide us with the addresses of any rental properties you have. Address: _____ Address: _____ Address: _____	If a property was not rented for a full 12 months, please provide details of why it was vacant. _____ _____
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<b>Rental Income and Expenditure</b>		✓
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"/>  <input type="checkbox"/>
<b>Income:</b> 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	
_____	_____	
_____	_____	
_____	_____	

<b>Home Office Expenses (if applicable)</b>		
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 <b>may</b> be able to claim a proportion of your home expenses against your rental income. Please provide the following details:		<input type="checkbox"/>
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                                         \$ _____		
<b>Total</b> \$ _____		
Cost of House and Section                \$ _____		
Cost of Section                                \$ _____		
Construction materials: (timber, brick, etc) _____		

<b>Residential Land Withholding Tax</b>		
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.	<input type="checkbox"/>	

<b>Mixed Use Holiday Home</b>		
Does this entity have a property (such as a holiday home or a bach) that is used privately and also to derive income?	<input type="checkbox"/>	

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) : \_\_\_\_\_

