

Rental Questionnaire

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2020	Email:	

To:

Terms of Engagement

I/we hereby instruct you to prepare our Taxation Returns for the 31 March 2020 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 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.

Please provide us with the bank account number you wish any refunds to be paid to

Bank				Branch				Account Number						Suffix					

Signature _____ Date _____

Property Details	
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 and for how long. _____ _____ _____

Sale/Purchase of property (if applicable)		✓
Did you buy or sell a rental property? <div style="text-align: right;">Yes <input type="checkbox"/> No <input type="checkbox"/></div>		
If yes, we require the following: <ul style="list-style-type: none"> • Solicitors Settlement Statement <input type="checkbox"/> • Sale and Purchase Agreement <input type="checkbox"/> • Loan details for property purchased <input type="checkbox"/> • A copy of the latest Rateable Valuation <input type="checkbox"/> • A list of chattels with their dates and value for properties brought or sold during the year <input type="checkbox"/> • If Residential Land Withholding Tax has been deducted and paid to the IRD, please provide details e.g. IR1100 Residential land withholding tax return. <input type="checkbox"/> 		

Rental Income and Expenditure		✓
Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties		<input type="checkbox"/>
Please provide details of the following for each rental property. Use a separate sheet if necessary, and include invoices.		<input type="checkbox"/>
Income:		
Total Rent Received	\$ _____	
Expenses:		
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:		<input type="checkbox"/>
Area used for Business:	_____ m ²	
Total Area of House & Workshop:	_____ m ²	
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)		

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?		<input type="checkbox"/>
Yes <input type="checkbox"/> No <input type="checkbox"/>		
If yes, please see our mixed use holiday home questionnaire on our website www.hargreaves.co.nz .		

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