

Rental Questionnaire

Ensure this is completed and included with your records

Client Name	
Balance 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. _____ _____ _____

Rental Income and Expenditure	✓															
<p>Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties OR Please provide details of the following for each rental property. Use a separate sheet if necessary.</p>																
<table border="1"> <tr> <td>Income</td> </tr> <tr> <td>Total rent received</td> </tr> <tr> <td> </td> </tr> <tr> <td>Expenses</td> </tr> <tr> <td>Accounting fees</td> </tr> <tr> <td>Advertising (to rent)</td> </tr> <tr> <td>Bank fees</td> </tr> <tr> <td>Insurance</td> </tr> <tr> <td>Legal fees</td> </tr> <tr> <td>Management fees</td> </tr> <tr> <td>Phone</td> </tr> <tr> <td>Power</td> </tr> <tr> <td>Rates</td> </tr> <tr> <td>Repairs and Maintenance</td> </tr> <tr> <td>Mortgage Interest</td> </tr> </table>		Income	Total rent received		Expenses	Accounting fees	Advertising (to rent)	Bank fees	Insurance	Legal fees	Management fees	Phone	Power	Rates	Repairs and Maintenance	Mortgage Interest
Income																
Total rent received																
Expenses																
Accounting fees																
Advertising (to rent)																
Bank fees																
Insurance																
Legal fees																
Management fees																
Phone																
Power																
Rates																
Repairs and Maintenance																
Mortgage Interest																
<p>(Please attach copies of loan summaries and invoices for repairs and maintenance) Details of any other expenses relating to rental property: _____ _____</p>																
<p>Details of visits to inspect property/conduct property business:</p> <table border="1"> <thead> <tr> <th>Date</th> <th>Details</th> <th>Kilometres</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> </tbody> </table>		Date	Details	Kilometres	_____	_____	_____	_____	_____	_____						
Date	Details	Kilometres														
_____	_____	_____														
_____	_____	_____														

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	<input type="checkbox"/>	
Residential Property Sales		
Have you sold any residential property during the year (not otherwise detailed on the information provided)?	<input type="checkbox"/>	
If yes, when was the property purchased?		_____
If it was purchased within 5 years of the sale date:		
<ul style="list-style-type: none"> • 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 to derive income?		<input type="checkbox"/>
If yes, please provide details of property:		
Was the property empty for 62 days in the income year?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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	\$	_____
Electricity	\$	_____
Kilometres travelled to inspect property	Total No.	_____
Other (please give details) :		_____
Other Details Required (if applicable)		
• 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 bought or sold during the year		<input type="checkbox"/>

Client Name:	Signature:
---------------------	-------------------