

# Rental Questionnaire – 2019

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Fax:	
		Email:	

## Terms of Engagement

To: Oldershaw & Co Ltd

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

Name	Signature	Date

- *The authority to act must be signed by all appropriate signatories i.e. all partners in a partnership, trustees in a trust and directors in a company (except where recorded that one director has specific signing authority or one person has recorded delegated authority from the other owners/members to sign on their behalf). Trustees who are acting as a Trustee in their professional capacity are not required to sign an authority to act, unless all trustees in the Trust are professional trustees, in which case at least one Trustee should sign. See **IRD Information Authority** for full details of this requirement.*

**Under the Companies Amendment Act 2014 there is now a requirement for all directors to provide their place of birth and date of birth AND in addition, there must be at least one director that either lives in New Zealand; or lives in Australia and is a director of a company incorporated in Australia:**

Director	Date of birth	City / Town of birth	Country of birth	Current residential address

<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. _____ _____

<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: <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Date</th> <th style="text-align: left;">Details</th> <th style="text-align: left;">Kilometres</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> </tbody> </table>	Date	Details	Kilometres	_____	_____	_____	_____	_____	_____	_____	_____	_____		
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>Mixed Use Holiday Home</b>		
<p>Does this entity have a property (such as a holiday home or a bach) that is used privately and also to derive income? <span style="float: right;">Yes <input type="checkbox"/> No <input type="checkbox"/></span></p> <p>If yes, provide details of property: _____</p> <p>_____</p>	<input type="checkbox"/>	
<p>Was the property empty for 62 days in the income year? <span style="float: right;">Yes <input type="checkbox"/> No <input type="checkbox"/></span></p> <p>If yes, please complete the following section so we can determine the amount of allowable deductions.</p>		
<b><u>Mixed Use Holiday Home – Information Required</u></b>		
<p>The number of days the property was empty during the income year _____</p> <p>The number of days the asset was used by family or associated persons* during the income year _____</p> <p>OR where income from any person received was less than 80% of market rate _____</p> <p><small>* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property</small></p>		
<p>If there is more than one tenant who used the property through the year, please attach details.</p> <p>Name of tenant: _____</p> <p>Relationship to owner (if any): _____</p> <p>Amount of rent they paid: \$ _____</p> <p>Dates rented (From: To) _____</p>	<input type="checkbox"/>	
<p>Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):</p> <p>Cost of advertising for tenants <span style="float: right;">\$ _____</span></p> <p>Cost of repairing damages caused by tenants <span style="float: right;">\$ _____</span></p> <p>Number of days spent in the property while repairing damages caused by tenants _____</p> <p>Mortgage interest <span style="float: right;">\$ _____</span></p> <p>Rates <span style="float: right;">\$ _____</span></p> <p>Insurance <span style="float: right;">\$ _____</span></p> <p>Repairs/maintenance for general wear and tear <span style="float: right;">\$ _____</span></p> <p>Other (please give details) : _____</p>	<input type="checkbox"/>	

Mixed Use Boat or Plane		
<p>Does this entity have a boat or plane (with a market value of \$50,000 or greater), that is used privately and also to derive income? Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<input type="checkbox"/>	
<p>If Yes, provide details:</p>		
<p>Description: _____</p>		
<p>Market value: \$ _____</p>		
<p>Was the asset unused for 62 days in the income year? Yes <input type="checkbox"/> No <input type="checkbox"/></p>		
<p>If yes, please complete the following section so we can determine the amount of allowable deductions.</p>		
<u>Mixed Use Boat or Plane – Information Required</u>		
<p>The number of days the asset was <b>unused</b> during the income year _____</p>		
<p>The number of days the asset was used by family or associated persons* during the income year _____</p>		
<p>OR where income from any person received was less than 80% of market rate _____</p>		
<p>* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property</p>		
<p>For non-associated persons where payment received is at least 80% of market value:</p>		<input type="checkbox"/>
<p>Number of days the asset was used: _____</p>		
<p>Income received: \$ _____</p>		
<p>Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):</p>		<input type="checkbox"/>
<p>Cost of advertising for hireage</p>	<p>\$ _____</p>	
<p>Cost of repairing damages caused by hireage</p>	<p>\$ _____</p>	
<p>Operating costs / supplies</p>	<p>\$ _____</p>	
<p>Insurance</p>	<p>\$ _____</p>	
<p>Repairs/maintenance for general wear and tear</p>	<p>\$ _____</p>	
<p>Other (please give details)</p>	<p>_____</p>	
<p>_____</p>		
<u>Other Details Required (if applicable)</u>		
<ul style="list-style-type: none"> <li>Solicitors Settlement Statement</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Sale and Purchase Agreement</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Loan details for property purchased</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>A copy of the latest Rateable Valuation</li> </ul>		<input type="checkbox"/>
<ul style="list-style-type: none"> <li>A list of chattels with their dates and value for properties bought or sold during the year</li> </ul>		<input type="checkbox"/>

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