

Rental Questionnaire – 31 March 2020

Ensure this questionnaire is completed and included with your records

Client Name:		Phone:	
Balance Date:		Fax:	
		Email:	

To: Sutcliffe Graham & Co Limited

Terms of Engagement

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

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. _____ _____

Rental Income and Expenditure		✓
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.		<input type="checkbox"/>
Income: Total Rent Received \$ _____		<input type="checkbox"/>
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
_____	_____	_____
_____	_____	_____
_____	_____	_____

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"/>

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? If yes, provide details of property: _____ _____	Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>
Was the property empty for 62 days in the income year? If yes, please complete the following section so we can determine the amount of allowable deductions.	Yes <input type="checkbox"/> No <input type="checkbox"/>	

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.	<input type="checkbox"/>
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):	<input type="checkbox"/>
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) : _____	

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"/>

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