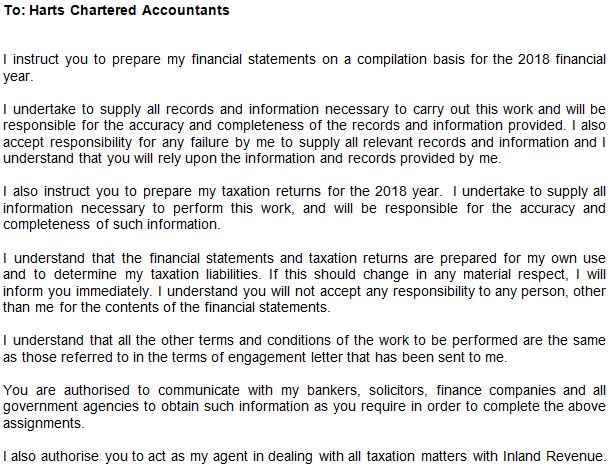
Company Rental Questionnaire – 2018

Please ensure this questionnaire is completed, signed and included with your records

|  |  |  |  |
| --- | --- | --- | --- |
| Client Name |  | Phone: |  |
| Balance Date | 31 March 2018 | Fax: |  |
| E-mail: |  |



Signature Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(if sending this back by email, please type your name in above – otherwise sign it. By doing so, you are acknowledging that you accept the above terms and conditions of the engagement)

**Inland Revenue prefers to pay any refunds by direct credit.  Would you please advise the**

**bank account number you would like any refunds deposited in to.**

**Account number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Rental Property Questionnaire – 2018

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Property Details |  | | |
| Address of rental property:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | If property was not rented for a full 12 months, please provide details of why it was vacant **and the number of days vacant**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |
| Number of days the property was used privately (by you, your family or associated persons, even if rent was charged) during the period |  | | |
| Number of days the property was rented out for less than 80% of the market rate to persons not associated to you |  | | |
| 2. 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.  **Income:**  Total rent received $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Expenses:**  Rates $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Insurance $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Repairs and Maintenance (please attach details or invoices) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Mortgage interest (attach copy of loan summary/statements from bank) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Travel \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_km    Details of any other expense relating to rental property:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Please attach all relevant documentation, including property manager’s statements, and details of any assets purchased over $500 | |  | |
| **3. Rental property sold, purchased or rental ceased during the financial year** | | Yes  No |
| **If yes please provide the following:**   * Solicitors settlement statement * Sale and Purchase Agreement * Loan details for property purchased * A copy of the latest rateable valuation * A list of chattels and their value for properties bought or sold during the year * If ceased renting – date ceased \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Records and information required** | **✓** | | | **Comments:** | |
| **4. Investment Income** | | | | | |
| Do you have New Zealand investments?  Do you have overseas investments?  If yes, please provide all interest and dividend advices, and changes in investments |  | |  | | |
| **5. Expenses paid in Cash or from Personal Funds** | | | | | |
| Please provide a list if applicable. | |  |  | | |
| **6. Events /Contingencies** | | | | | |
| There have been events occurring after balance date that will have a financial effect on subsequent years.  Details :  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  There were contingencies at balance date, the outcome of which will be determined by the occurrence or non–occurrence of an event.  Details :  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |  | | |
| **7. Goods & Services Tax (GST) Returns** | | | | | |
| Are you GST registered?  If Yes, supply copies of Goods & Services Tax (GST) returns and  workpapers | No  Yes | | | |  |
| **8. Changes in Company details** | | | | | |
| Please provide details of any changes in the following   * Shareholding * Registered office * Directors * Shareholder address |  | | |  | |
| **9. Other Income** | | | | | |
| Please provide details of any other income |  | | |  | |
| **10. Home Office Expenses** | | | | | |
| If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:  Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Business Area: \_\_\_\_\_\_\_\_\_\_\_m2  Total Area: \_\_\_\_\_\_\_\_m2  Power $\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Insurance (Building & Contents) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Interest (House Mortgage) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Rates $\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Repairs & Maintenance $\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Rent paid $\_\_\_\_\_\_\_\_\_\_\_\_  Other $\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |  | | |  | |