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: \_\_\_\_\_\_\_\_\_\_\_m2Total Area: \_\_\_\_\_\_\_\_m2Power $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Insurance (Building & Contents) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Interest (House Mortgage) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_Rates $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Repairs & Maintenance $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rent paid $\_\_\_\_\_\_\_\_\_\_\_\_Other $\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |  |  |