

Rental Questionnaire – 2020

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Mobile:	
		Email:	

To: Leslie & O'Donnell 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.

Name	IRD Number	Signature	Date

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

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"/>																																												
<p>Income: Total Rent Received \$ _____</p> <p>Expenses:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 33%;">Accounting fees</td> <td style="width: 15%;">\$ _____</td> <td style="width: 33%;">Phone</td> <td style="width: 19%;">\$ _____</td> </tr> <tr> <td>Advertising (to rent)</td> <td>\$ _____</td> <td>Power</td> <td>\$ _____</td> </tr> <tr> <td>Bank fees</td> <td>\$ _____</td> <td>Rates</td> <td>\$ _____</td> </tr> <tr> <td>Insurance</td> <td>\$ _____</td> <td colspan="2">(including regional council rates)</td> </tr> <tr> <td>Legal fees</td> <td>\$ _____</td> <td>Repairs and Maintenance</td> <td>\$ _____</td> </tr> <tr> <td>Management fees</td> <td>\$ _____</td> <td colspan="2">(please attach details or invoices)</td> </tr> <tr> <td>Mortgage Interest</td> <td>\$ _____</td> <td>Valuation fees</td> <td>\$ _____</td> </tr> <tr> <td>(attach copy of loan summary/statements from bank)</td> <td></td> <td>Water rates</td> <td>\$ _____</td> </tr> </table> <p>Details of any other expense relating to rental property: _____ \$ _____ _____ \$ _____</p> <p>Details of visits to inspect property/conduct property business:</p> <table style="width: 100%; border: none;"> <thead> <tr> <th style="width: 10%;">Date</th> <th style="width: 50%;">Details</th> <th style="width: 40%;">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>	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	\$ _____	Date	Details	Kilometres	_____	_____	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/>
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	\$ _____																																										
Date	Details	Kilometres																																											
_____	_____	_____																																											
_____	_____	_____																																											
_____	_____	_____																																											

Home Office Expenses (if applicable)	
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 may 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 ²	
Total Area of House & Workshop: _____ m ²	
Power	\$ _____
Insurance (Building & Contents)	\$ _____
Interest (House Mortgage)	\$ _____
Rates (including regional council rates)	\$ _____
Repairs and maintenance	\$ _____
Other	\$ _____
Total	\$ _____
Cost of House and Section	\$ _____
Cost of Section	\$ _____
Construction materials: (timber, brick, etc) _____	

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.

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?

Yes No

If yes, provide details of property: _____

Was the property empty for 62 days in the income year?

Yes No

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 \$ _____

Other (please give details) : _____

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: Description: _____ Market value: \$ _____</p>														
<p>Was the asset unused 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.</p>														
<p><u>Mixed Use Boat or Plane – Information Required</u></p>														
<p>The number of days the asset was unused 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 _____ <small>* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property</small></p>														
<p>For non-associated persons where payment received is at least 80% of market value: Number of days the asset was used: _____ Income received: \$ _____</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> <table style="width: 100%;"> <tbody> <tr> <td>Cost of advertising for hireage</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Cost of repairing damages caused by hireage</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Operating costs / supplies</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Insurance</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Repairs/maintenance for general wear and tear</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Other (please give details)</td> <td style="text-align: right;">_____</td> </tr> </tbody> </table>	Cost of advertising for hireage	\$ _____	Cost of repairing damages caused by hireage	\$ _____	Operating costs / supplies	\$ _____	Insurance	\$ _____	Repairs/maintenance for general wear and tear	\$ _____	Other (please give details)	_____	<input type="checkbox"/>	
Cost of advertising for hireage	\$ _____													
Cost of repairing damages caused by hireage	\$ _____													
Operating costs / supplies	\$ _____													
Insurance	\$ _____													
Repairs/maintenance for general wear and tear	\$ _____													
Other (please give details)	_____													
<p><u>Other Details Required (if applicable)</u></p>														
<ul style="list-style-type: none"> • Solicitors Settlement Statement • Sale and Purchase Agreement • Loan details for property purchased • A copy of the latest Rateable Valuation • A list of chattels with their dates and value for properties bought or sold during the year 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>													

**Thank you for completing this questionnaire
Please don't forget to sign it on Page 1**