

Rental Questionnaire – 31 March 2015

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2015	Fax:	
		Email:	

To: Jollands Callander

Terms of Engagement

We hereby instruct you to prepare our Taxation Returns for the _____ year. I 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 bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the above assignments.

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 2% per month, and that all accounts are due for payment within 7 days of receipt of invoice. I/We accept that any collection costs you incur will be fully recoverable from me/us.

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.

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.

Any information acquired by us in the course of our engagement is subject to strict confidentiality requirements. Information will not be disclosed by us to other parties except as required or allowed for by law or professional standards, or with your express consent. Our files may, however, be subject to review as part of the quality control review program of CPA Australia which monitors compliance with professional standards by its members. We advise you that by signing this letter you acknowledge that, if requested, our files relating to this engagement will be made available under this program. Should this occur, we will advise you. The same strict confidentiality requirements apply under this program as apply to us.

We may collect Personal Information about your representatives, your clients and others when we provide services to you. If we do, you agree to work with us to ensure that we both meet the obligations that we each may have under the Privacy Act 1993 NZ (as amended) (**Privacy Act**). The obligations may include notifying the relevant person to whom the personal information relates who we are and how we propose to use their personal information. Where you have collected personal information, you confirm that you have collected the personal information in accordance with the Privacy Act, that you are entitled to provide this personal information to us and that we may use and disclose the personal information for the purpose/s we provide our services to you. We will handle personal information in accordance with the Privacy Act.

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"/> <input type="checkbox"/>
Income: Total Rent Received \$ _____		
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 _____ _____		

Mixed Use Holiday Home (if applicable)		
Do you have a property (such as a holiday home or a bach) that is used privately and also to derive income? Details of property _____ _____		<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.		<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 property was used by family or associated persons* during the income year _____ <small>* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property</small> 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) _____		<input type="checkbox"/>
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)	

Home Office Expenses (if applicable)	
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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:

Area used for Business: _____ m²

Total Area of House & Workshop: _____ m²

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)

Other Details Required (if applicable)	
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- | | |
|---|--------------------------|
| • 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