

Rental Questionnaire – 31 March 2020

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2020	Fax:	
		Email:	
Bank account number for IRD refunds			

To: BWTL Advisory Limited

Terms of Engagement

I/We hereby instruct you to prepare my/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, ACC 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. You are therefore authorised to sign any taxation return on behalf of myself/ourselves or any of my/our associated entities.

I/We understand that the Taxation Returns are prepared for my/our own use and to determine my taxation liabilities. If this should change in any material respect, I/we will inform you immediately. You will not accept any responsibility to any person, other than me/us, for the contents of the Taxation Returns.

I/We also accept that all accounts are due for payment by the 20th of the month following invoice date. I/We further accept that any collection costs incurred by BWTL Advisory Limited will be fully recoverable from me/us.

Signature _____ Date _____

Property Details		
Please provide us with the addresses of any rental properties you have.		If a property was not rented for a full 12 months, please provide details of why it was vacant. _____ _____
1. Address:	_____	
2. Address:	_____	
3. Address:	_____	
Rental Income and Expenditure		
Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties		<input type="checkbox"/>
OR Please provide details of the following for each rental property. Use a separate sheet if necessary.		
Income:		
Total Rent Received	\$ _____	<input type="checkbox"/>
Expenses:		
Rates and Water Rates	\$ _____	
Insurance	\$ _____	
Repairs and Maintenance (please attach details or invoices)	\$ _____	
Mortgage Interest (attach copy of loan summary/statements from bank)	\$ _____	
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

Do you have a property (such as a holiday home or a bach) that is used privately and also 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) : _____

Book a Bach/Air BnB

Does this entity provide any accommodation via Book a Bach/Air Bnb? Yes No

Other Details Required

- | | |
|--|--------------------------|
| • Solicitors Property Settlement Statement | <input type="checkbox"/> |
| • Property 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 and their value for properties bought or sold during the year | <input type="checkbox"/> |

**Thank you for completing this questionnaire
Don't forget to sign page 1**