

Rental Questionnaire

Ensure this questionnaire is completed and included with your records

| | | | |
|--------------|--|--------|--|
| Client Name | | Phone: | |
| Balance Date | | Fax: | |
| | | Email: | |

To: Cowley Stanich & Co Ltd

Terms of Engagement

I/we hereby instruct you to prepare our Taxation Returns for the _____ 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.

- *The authority to act must be signed by all appropriate signatories i.e. all partners in a partnership, trustees in a trust and directors in a company (except where recorded that one director has specific signing authority or one person has recorded delegated authority from the other owners/members to sign on their behalf). Trustees who are acting as a Trustee in their professional capacity are not required to sign an authority to act, unless all trustees in the Trust are professional trustees, in which case at least one Trustee should sign. See **IRD Information Authority** for full details of this requirement.*

| Name | IRD Number | Signature | Date |
|------|------------|-----------|------|
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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 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) : _____

