

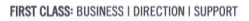
Ensure this questionnaire is completed and included with your records.

**Complete this form in addition to your applicable Individual/Business/Trust/Farming form.**

Client Name:	
Balance Date	31 March 2019

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.  _____ _____	
Address: _____					
Address: _____ Address: _____					
Rental Income and Expenditure					
Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties <b>OR</b> Please provide details of the following for each rental property. Use a separate sheet if necessary.					
<b>Income:</b>					
Total Rent Received	\$	_____			
<b>Expenses:</b>					
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	
_____	_____			_____	
_____	_____			_____	
_____	_____			_____	

<b>Home Office Expenses</b> (if applicable)		
<p>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 <b>may</b> be able to claim a proportion of your home expenses against your rental income. Please provide the following details:</p> <p>Area used for Business: _____ m<sup>2</sup></p> <p>Total Area of House &amp; Workshop: _____ m<sup>2</sup></p> <p>Power \$ _____</p> <p>Insurance (Building &amp; Contents) \$ _____</p> <p>Interest (House Mortgage) \$ _____</p> <p>Rates (including regional council rates) \$ _____</p> <p>Repairs and maintenance \$ _____</p> <p>Other \$ _____</p> <p><b>Total</b> \$ _____</p> <p>Cost of House and Section \$ _____</p> <p>Cost of Section \$ _____</p> <p>Construction materials: (timber, brick, etc)</p> <p>_____</p>		<input type="checkbox"/>
<b>Residential Land Withholding Tax</b>		
<p>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.</p>	<input type="checkbox"/>	
<b>Residential Property Sales</b>		
<p>Have you sold any residential property during the year (not otherwise detailed on the information provided)?</p> <p>If yes, when was the property purchased?</p> <p>If it was purchased with 5 years of the sale date,</p> <ul style="list-style-type: none"> <li>• what was the original purchase price</li> <li>• and the sale price?</li> </ul>	<input type="checkbox"/>	<p>_____</p> <p>\$ _____</p> <p>\$ _____</p>



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.

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 \_\_\_\_\_

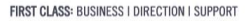
Mortgage interest \$\_\_\_\_\_

Rates \$

Insurance \$\_\_\_\_\_

Repairs/maintenance for general wear and tear \$

Other (please give details) : \_\_\_\_\_



**Thank you for completing this questionnaire**