

# RENTAL INFORMATION ON QUESTIONNAIRE FOR THE YEAR ENDED 31 MARCH 2019

NAME or ENTITY: \_\_\_\_\_

Please confirm your contact details (if changed)			
Postal address		Telephone	
		Mobile	
Contact Person		E-mail address	
IRD number		Preferred method of contact	Post
			Email

It is a requirement for us to retain a questionnaire on file for each income year. We thank you for taking the time to complete this questionnaire for each trading entity that requires financial statements and / or an income tax return to be prepared.

If you have any queries about how to complete this questionnaire please contact us on (07) 378 7150 or (06) 388 0860

## PLEASE PROVIDE THE FOLLOWING DATA:

Property Address 1	Property Address 2	Property Address 3
_____	_____	_____
_____	_____	_____
_____	_____	_____
Rent Received	Rent Received	Rent Received
_____	_____	_____
Advertising	Advertising	Advertising
_____	_____	_____
Accountancy fee	Accountancy fee	Accountancy fee
_____	_____	_____
Bank Charges	Bank Charges	Bank Charges
_____	_____	_____
Interest	Interest	Interest
_____	_____	_____
Management fee	Management fee	Management fee
_____	_____	_____
Repairs & Main	Repairs & Main	Repairs & Main
_____	_____	_____
Other	Other	Other
_____	_____	_____

**FOR PROPERTIES PURCHASED OR NEWLY RENTED IN THIS TAX YEAR:**

- (a) Please enclose a copy of the sale and purchase agreement for any rental property / properties purchased during the year. YES / NO / NA
- (b) Please supply a list of all chattels for each property purchased during the year, listing their market value at time of purchase (see attached forms). YES / NO / NA
- (c) Please enclose real estate summaries if using a rental agent. YES / NO / NA

**FOR MIXED USE ASSETS:**

Is the property a mixed use assets such as a holiday home

- 1) Used for income earning use and
- 2) Used for provide use and
- 3) Is unoccupied for 62 days or more of the year

- (a) In addition to the above, please provide details of how the asset is used for each day of the year, including days on which the asset was used privately by yourself or family, days it was rented to non-associated people, days it was vacant, and days it was unavailable due to carrying out repairs and / or maintenance.

Please record separately:

- Days carrying out repairs for damage caused by non-associated people renting the property at market value
- Days carrying out repairs for damage caused by private use, and
- Days carrying out repairs for general wear and tear.

- (b) Details of who used the home each days it was in use including the

- Number of days they used the property
- Person's relationship to you (i.e. son, friend unrelated)
- Rent charged to each person

- (c) Details repair costs split between costs for damage caused by non-associated people renting the property for market value, repairs required from private use, and general wear and tear.

Details	✓	Days	Amount
Rented to third parties at market value			
Booked by third parties but not used			
Rented to family at any price			
Used by owner / family / friends for free			
Booked for income earning use but not actually used			
Days unused			

NOTES: \_\_\_\_\_

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