

Rental Questionnaire – 2018

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	Business : Cellular: «Mobile»
Balance Date		Fax:	
		Email:	

Terms of Engagement

We hereby instruct Lawson Avery Ltd to prepare our Taxation Returns for the 2018 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.

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.

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.

Signature _____ Date _____

IRD requires that a bank account be provided for any refunds as they will be no longer issuing cheques, Please advise account details below.

Account Name : _____

Account Number: _____ - _____ - _____

Property Details	
Please provide us with the addresses of any rental properties you have. 1. Address: _____ 2. Address: _____ 3. 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	<input type="checkbox"/>
OR	<input type="checkbox"/>
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 \$ _____	
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	
_____	<input type="checkbox"/>

Home Office Expenses	
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 \$ _____	
Repairs & Maintenance \$ _____	
Other \$ _____	
Total \$ _____	
Cost of House and Section \$ _____	
Cost of Section \$ _____	
Construction materials: (timber, brick, etc)	

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?	<input type="checkbox"/>
Details of property	

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"/>
<u>Mixed Use Holiday Home – Information Required</u>	
The number of days the property was empty during the income year _____	

