

Rental Questionnaire – 2019

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	Business : Cellular:
Balance Date		Fax:	
		Email:	

Terms of Engagement

We hereby instruct Lawson Avery Ltd to prepare our Taxation Returns for the 2019 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 OR Please provide details of the following for each rental property. Use a separate sheet if necessary.	<input type="checkbox"/>												
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: <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; width: 10%;">Date</th> <th style="text-align: left; width: 60%;">Details</th> <th style="text-align: left; width: 30%;">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>	Date	Details	Kilometres	_____	_____	_____	_____	_____	_____	_____	_____	_____	
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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? Details of property _____ _____	<input type="checkbox"/>
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 _____	

