

Rental Questionnaire – 31 March 2018

Ensure this questionnaire is completed and included with your records

| | | | |
|--------------|------------|--------|--|
| Client Name | | Phone: | |
| Balance Date | 31/03/2018 | Fax: | |
| | | Email: | |

To: Su & Co Chartered Accountants Limited

Terms of Engagement

I hereby instruct you 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. I/We understand that you will rely upon the information provided by me/us. It is our responsibility to ensure the content or accuracy of any Tax Returns that you prepared on my/our behalf as they will be prepared based on information that I/we provide to you.

I/We understand that the Taxation Returns are prepared for my/our own use and to determine my/our taxation liabilities. If this should change in any material respect, I/we will inform you immediately. You will not accept any responsibility to any person, other than me/us, for the contents of the Tax Returns.

All other terms and conditions of this engagement are the same as those referred to in the original Engagement Letter I/we signed when I/we became a client.

I/We accept that payment for the services provided is required on the 20th of the month following completion of the engagement. I/We also accept that should I/we default on payment Su & Co Chartered Accountants Limited will charge interest on overdue accounts at the rate of 1.5% per month, and I/we accept that if Su & Co Chartered Accountants Limited is required to obtain a debt collection agency to recover the costs, any costs incurred by the agency in the course of collection of outstanding monies including commissions will be on charged to me/us.

I/We agree that ownership of the work is retained by Su & Co Chartered Accountants Limited until payment has been made in full.

I/We authorise the deduction of fees outstanding to Su & Co Chartered Accountants Limited from any taxation refunds should payment for the services provided not be made in full by the required date. I/We agree to personally indemnify Su & Co Chartered Accountants Limited for fees outstanding.

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.

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 _____

**Thank you for completing this questionnaire
Please don't forget to sign it**

| 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 | \$ _____ | |
| Power | \$ _____ | |
| Phone | \$ _____ | |
| Repairs and Maintenance (please attach details or invoices) | \$ _____ | |
| Water rates | \$ _____ | |
| Mortgage Interest (attach copy of loan summary/statements from bank) | \$ _____ | |
| Rates (including regional council rates) | | |
| Details of any other expense relating to rental property: | | |
| _____ | \$ _____ | |
| _____ | \$ _____ | |
| Details of visits to inspect property/conduct property business: | | |
| Date | Details | Kilometres |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

| 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 (including regional council rates) | \$ _____ | |
| Repairs and maintenance | \$ _____ | |
| Other | \$ _____ | |
| Total | \$ _____ | |
| Cost of House and Section | \$ _____ | |
| Cost of Section | \$ _____ | |
| Construction materials: (timber, brick, etc) | | |
| _____ | | |

| Other Details Required | |
|--|--------------------------|
| • Solicitors Settlement Statement | <input type="checkbox"/> |
| • Sale and Purchase Agreement | <input type="checkbox"/> |
| • Loan details for property purchased | <input type="checkbox"/> |
| • A copy of the latest Rateable Valuation | <input type="checkbox"/> |
| • A list of chattels and their value for properties bought or sold during the year | <input type="checkbox"/> |