

## Rental Questionnaire – 31 March 2021

**Ensure this questionnaire is completed and included with your records**

Client Name		Phone:	
Balance Date	31/03/2021	Fax:	
		Email:	

To: Su & Co Chartered Accountants Limited

### **Terms of Engagement**

I hereby instruct you to prepare our Taxation Returns for the 2021 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 20<sup>th</sup> 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**

<b>Property Details</b>	
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. _____ _____

<b>Rental Income and Expenditure</b>	✓												
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.	<input type="checkbox"/>												
<b>Income:</b> Total Rent Received \$ _____	<input type="checkbox"/>												
<b>Expenses:</b> 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: <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Date</th> <th style="width: 50%;">Details</th> <th style="width: 40%;">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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<b>Home Office Expenses</b>	
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:	<input type="checkbox"/>
Area used for Business: _____ m <sup>2</sup> Total Area of House & Workshop: _____ m <sup>2</sup>	
Power \$ _____ Insurance (Building & Contents) \$ _____ Interest (House Mortgage) \$ _____ Rates (including regional council rates) \$ _____ Repairs and maintenance \$ _____ Other \$ _____ <b>Total</b> \$ _____ 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"/>