

# Rental Questionnaire – 31 March 2023



Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31/03/2023	Email:	

To: Su & Co Chartered Accountants Limited

### Terms of Engagement

I/We hereby instruct you to prepare our Taxation Returns for the 2023 year. I/We 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 my/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 during preparation of the Taxation Returns you will not be specifically investigating non-compliance with laws and regulations – however should anything come to light of this nature during this process, you will bring that to my/our attention.

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 to personally indemnify Su & Co Chartered Accountants Limited for fees outstanding.

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 give you full authority to:

- Access and change information from the IRD for all tax types; this may be via telephone, in writing, via internet access, MyIR or info express;
- Access and change information through myACC for Business and/or directly with ACC staff;
- Verify financial information held by other parties, including: my/our bankers, solicitors, finance companies and all government agencies etc;
- This also relates to any prior financial years.

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 <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> Accounting Fees \$ _____ Advertising Fees (to rent) \$ _____ Bank Fees \$ _____ Agent Letting Fees \$ _____ Rates (including regional council rates) \$ _____ Insurance \$ _____ Power \$ _____ Phone \$ _____ Repairs and Maintenance (please attach details or invoices) \$ _____ Water rates \$ _____ Valuation Fees \$ _____ 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 _____ _____	

Purchase of Residential Property	
<b>If this was your main home, we do <u>not</u> need any details.</b>	
Did you purchase any Residential properties during the period from 1 April 2022 to 31 March 2023?	Yes/No
If <b>yes</b> , please provide: <ul style="list-style-type: none"> <li>• Solicitors Settlement Statement, Trust Account Statements, including copy of legal fees invoice</li> <li>• Sale and Purchase Agreement</li> <li>• Loan details for property purchased</li> <li>• A copy of the latest Rateable Valuation</li> <li>• A list of chattels and their value for properties bought during the year (if done)</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Did the property receive the Code of Compliance Certificate (CCC) on or after <b>27 March 2020</b> ?	Yes/No
If <b>yes</b> , please provide a copy of the Code of Compliance Certificate (CCC)	

<b>Sale of Residential Property (acquired after 29 March 2018)</b>	
<p>Did you sell any residential properties during the period from 1 April 2022 to 31 March 2023?</p> <p><b>If yes, please provide:</b></p> <ul style="list-style-type: none"> <li>• Solicitors Settlement Statement, Trust Accounts Statements, including copy of legal fees invoice and Agent Commission invoice</li> <li>• Sale Agreement</li> <li>• Purchase Agreement if it was purchased after 29 March 2018</li> <li>• Closing loan statements for property sold</li> <li>• A copy of the latest Rateable Valuation</li> <li>• A list of chattels and their value for properties sold during the year (if done)</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>

<b>Home Office Expenses</b>	
<p>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:</p> <p>Area used for Business: _____ m<sup>2</sup></p> <p>Total Area of House &amp; Workshop: _____ m<sup>2</sup></p> <p>Power \$ _____</p> <p>Insurance (Building &amp; Contents) \$ _____</p> <p>Interest (House Mortgage) \$ _____</p> <p>Rates (including regional council rates) \$ _____</p> <p>Repairs and maintenance \$ _____</p> <p>Other \$ _____</p> <p><b>Total</b> \$ _____</p> <p>Cost of House and Section \$ _____</p> <p>Cost of Section \$ _____</p> <p>Construction materials: (timber, brick, etc)</p> <p>_____</p>	<input type="checkbox"/>