

# Rental Questionnaire



**THIS FORM MUST BE COMPLETED & ACCOMPANY YOUR RECORDS**

Client ..... Year.....2017/2018.....

1. **Please provide either bank statements of the rental account/s for the full year, or a summary clearly showing rent received and expenses along with bank balances at 31/3/2018.**
2. **Was the property managed by an agent?** Yes / No  
If **yes** please provide agent's statements.
3. **Distance travelled in relation to the rental activity over the year?** .....
4. **Do you wish to claim a portion of your own dwelling expenses as an office?** Yes / No  
If **yes** please provide schedule of expenses.
5. **Was there any work done on the property which cost over \$500?** Yes / No  
If **yes**, please provide invoice/s.
6. **Has a rental property been purchased or sold during the year?** Yes / No  
If **yes**, please provide:
  - a. solicitors settlement statement
  - b. details of any borrowing and associated costs
7. **Was the property "available" to rent all year?** Yes / No
8. **Has there been a change of use of any property during the year?** Yes / No  
If **yes**, please explain.
9. **Loan Statements** – Are all statements/summaries for all bank loans attached, showing: Yes / No/ NA  
a. Interest for the year. b. amount outstanding.
10. **Working for Families.** Do you wish us to calculate your entitlement? Yes / No/ NA  
If **yes** please complete Supplement WFF questionnaire. This is available under the Resources tab at [www.biztax.co.nz](http://www.biztax.co.nz) or call us and we will send you one.
11. **Donations** - Do you want us to claim the rebate for donations made? If **yes** please provide receipts. If you want to claim this yourself, please DO NOT file claim with IRD until AFTER your Income Tax Return has been processed. Yes / No/ NA
12. **Investment Income** – Have you attached the **annual summaries** of any interest received and **advices of all dividends?** Yes / No / NA
13. **Overseas Income** – Did you receive overseas income from any source? Yes / No  
e.g. interest, dividends or pension. If **yes** please provide full details.
14. **Foreign Pension Schemes** – Have you transferred any foreign based pension scheme to a NZ or Australian scheme (including KiwiSaver) in the last 5 years? Yes / No

*I request that Business & Tax Centre Ltd prepare financial statements and Income Tax Returns based on the information provided above. I accept absolute responsibility for the accuracy and completeness of the records and all information provided.*

Signed ..... Date .....