

Rental Questionnaire

THIS FORM MUST BE COMPLETED & ACCOMPANY YOUR RECORDS

Client Year.....2018/2019.....

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 31/3/2019.**

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 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