

Name: _____

Address: _____

Rental Questionnaire – 2022/2023

Please ensure this questionnaire is completed and included with your records

Terms of Engagement

I/we hereby instruct DPA Limited and staff/contractors as applicable, 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.

Authority is given to obtain information and 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. I/we authorise you to obtain information from Inland Revenue about all tax types except child support (NCP or CPR) in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels.

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.

I/We also accept that you have the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I/We accept that any collection costs you incur will be fully recoverable from me/us.

The Anti-money Laundering and Countering Financing of Terrorism Act 2009 (AML/CFT Act) came into effect from 1 October 2018. As a result, this requires us to gather more information from our clients. Where possible we will try and obtain this information from you, through our online provider called Real You.

Signature

Date

Property Details	
Please provide us with the addresses of any rental properties you have. Address: _____ Address: _____ 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: <table style="width: 100%; border: none;"> <tr> <td style="width: 33%;">Accounting fees</td> <td style="width: 10%;">\$ _____</td> <td style="width: 33%;">Phone</td> <td style="width: 24%;">\$ _____</td> </tr> <tr> <td>Advertising (to rent)</td> <td>\$ _____</td> <td>Power</td> <td>\$ _____</td> </tr> <tr> <td>Bank fees</td> <td>\$ _____</td> <td>Rates</td> <td>\$ _____</td> </tr> <tr> <td>Insurance</td> <td>\$ _____</td> <td colspan="2">(including regional council rates)</td> </tr> <tr> <td>Legal fees</td> <td>\$ _____</td> <td>Repairs and Maintenance</td> <td>\$ _____</td> </tr> <tr> <td>Management fees</td> <td>\$ _____</td> <td colspan="2">(please attach details or invoices)</td> </tr> <tr> <td>Mortgage Interest</td> <td>\$ _____</td> <td>Valuation fees</td> <td>\$ _____</td> </tr> <tr> <td>(Attach copy of loan summary/statements from bank)</td> <td></td> <td>Water rates</td> <td>\$ _____</td> </tr> </table>	Accounting fees	\$ _____	Phone	\$ _____	Advertising (to rent)	\$ _____	Power	\$ _____	Bank fees	\$ _____	Rates	\$ _____	Insurance	\$ _____	(including regional council rates)		Legal fees	\$ _____	Repairs and Maintenance	\$ _____	Management fees	\$ _____	(please attach details or invoices)		Mortgage Interest	\$ _____	Valuation fees	\$ _____	(Attach copy of loan summary/statements from bank)		Water rates	\$ _____	
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Details of any other expense relating to rental property: _____ \$ _____ _____ \$ _____																																	
Details of visits to inspect property/conduct property business: <table style="width: 100%; border: none;"> <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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Home Office Expenses (if applicable)																												
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"/>																											
<table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Area used for Business:</td> <td style="width: 10%;">_____ m²</td> <td style="width: 40%;"></td> </tr> <tr> <td>Total Area of House & Workshop:</td> <td>_____ m²</td> <td>OR IRD Square Metre Rate Method (see below note)*</td> </tr> <tr> <td>Power</td> <td>\$ _____</td> <td>Interest (House Mortgage)</td> </tr> <tr> <td>Insurance (Building & Contents)</td> <td>\$ _____</td> <td>\$ _____</td> </tr> <tr> <td>Interest (House Mortgage)</td> <td>\$ _____</td> <td>Rates (including regional council rates)</td> </tr> <tr> <td>Rates (including regional council rates)</td> <td>\$ _____</td> <td>\$ _____</td> </tr> <tr> <td>Repairs and maintenance</td> <td>\$ _____</td> <td>Rent</td> </tr> <tr> <td>Other</td> <td>\$ _____</td> <td>\$ _____</td> </tr> <tr> <td>Total</td> <td>\$ _____</td> <td></td> </tr> </table>	Area used for Business:	_____ m ²		Total Area of House & Workshop:	_____ m ²	OR IRD Square Metre Rate Method (see below note)*	Power	\$ _____	Interest (House Mortgage)	Insurance (Building & Contents)	\$ _____	\$ _____	Interest (House Mortgage)	\$ _____	Rates (including regional council rates)	Rates (including regional council rates)	\$ _____	\$ _____	Repairs and maintenance	\$ _____	Rent	Other	\$ _____	\$ _____	Total	\$ _____		
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*Would you like to use the IRD rate? Currently it is \$42.75 per square m. _____ Mortgage Interest, Rates or Rent costs so we would still require these amounts.																												

Covid-19 Wage Subsidy and Small Business Loan	
Have you received the Wage Subsidy? (please note all dates and receipts)	<input type="checkbox"/> Date rec: __/__/__ \$ _____
Have you received Resurgence Support Payments? (please note all dates and receipts)	<input type="checkbox"/> Date rec: __/__/__ \$ _____
Have you received the Government Small Business Loan?.	<input type="checkbox"/> Date rec: __/__/__ \$ _____
Residential Land Withholding Tax	
Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? If so, provide details e.g. IR1100 Residential land withholding tax return and other sale and purchase documents.	<input type="checkbox"/>
Residential Property Sales	
Have you sold any residential property during the year (not otherwise detailed on the information provided)?	<input type="checkbox"/>
If yes, when was the property purchased?	_____
If it was purchased with 5 years of the sale date,	\$ _____
• what was the original purchase price?	_____
and the sale price?	_____
Mortgage Interest Paid on Residential Properties	
Have you incurred interest on residential properties owned (which is not your main family home)? Is the interest also against properties other than residential rentals? If so, please provide details of amount of interest and dates paid.	<input type="checkbox"/>
Mixed Use Holiday Home	
Does this entity have a property (such as a holiday home or a bach) that is used privately and also to derive income?	<input type="checkbox"/>
If yes, provide details of property: _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
Was the property empty for 62 days in the income year?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, please complete the following section so we can determine the amount of allowable deductions.	
Mixed Use Holiday Home – Information Required	
The number of days the property was empty during the income year	_____
The number of days the asset was used by family or associated persons* during the income year	_____
OR where income from any person received was less than 80% of market rate _____	
* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property	
If there is more than one tenant who used the property through the year, please attach details.	<input type="checkbox"/>
Name of tenant: _____	
Relationship to owner (if any): _____	
Amount of rent they paid: \$ _____	
Dates rented (From: To) _____	
Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):	<input type="checkbox"/>
Cost of advertising for tenants	\$ _____
Cost of repairing damages caused by tenants	\$ _____

