

## Rental Questionnaire – 2023/2024

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Email:	

To: DPA Limited

### **Terms of Engagement**

I/We hereby instruct you DPA Limited and staff/contractors as applicable to prepare our Taxation Returns for the 2024 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 from Inland Revenue, other government agencies and financial institutions about all tax types (except child support), bank and loan accounts in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels including electronic ones.

I/We give authority for any refund credits to be transferred to DPA Limited's trust account prior to refund to me/us.

I/We authorise your organisation to act as our agent for ACC levy purposes for all associated entities. This authorisation allows your organisation to query and change information on my/our ACC levy account(s) through ACC staff, and through MyACC for Business. This authority will also allow your organisation's main representative discretion to delegate access to my/our ACC information to other members of your organisation. Other delegated members of your organisation will also be able to query and change information on my/our ACC levy account.

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 20<sup>th</sup> 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.

Name	Signature	Date

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

<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"/>  <input type="checkbox"/>
<b>Income:</b> Total Rent Received                    \$ _____		
<b>Expenses:</b>		
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                                \$ _____	
Details of any other expense relating to rental property:		
_____	\$ _____	
_____	\$ _____	
Details of visits to inspect property/conduct property business:		
Date      Details	Kilometres	
_____	_____	
_____	_____	
_____	_____	

## Rental Income from Overseas

Provide details of any income received from overseas, including rental income and any tax deducted from this income

## Home Office Expenses

If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:

Address for Home Office

Home Office area: - no change as per previous year

OR

Area used for Business: \_\_\_\_\_ m<sup>2</sup>

Total Area of House & Workshop: \_\_\_\_\_ m<sup>2</sup>

Actual Cost Method

OR IRD Square Metre Rate Method (see below note)\*

Power \$ \_\_\_\_\_

Insurance (Building & Contents) \$ \_\_\_\_\_

Interest (House Mortgage) \$ \_\_\_\_\_

Interest (House Mortgage) \$ \_\_\_\_\_

Rates (including regional council rates) \$ \_\_\_\_\_

Rates (including regional council rates) \$ \_\_\_\_\_

Rent \$ \_\_\_\_\_

Rent \$ \_\_\_\_\_

Repairs & Maintenance \$ \_\_\_\_\_

Telephone rental \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

**Total** \$ \_\_\_\_\_

*\*Would you like to use the IRD rate? Currently it is \$47.85 per square metre. This allowance doesn't cover Mortgage Interest, Rates or Rent costs so we would still require these amounts.*

*Covid-19 Wage Subsidy and other Covid-19 support payments*

## Covid-19 Wage Subsidy and other Covid-19 support payments

**Have you received the Covid-19 Leave Support Payments? (please note all dates and receipts)**

Date rec: \_\_/\_\_/\_\_ \$ \_\_\_\_\_

Date rec: \_\_/\_\_/\_\_ \$ \_\_\_\_\_

Date rec: \_\_/\_\_/\_\_ \$ \_\_\_\_\_

Date rec: \_\_/\_\_/\_\_ \$ \_\_\_\_\_

Date rec: \_\_/\_\_/\_\_ \$ \_\_\_\_\_

Date rec: \_\_/\_\_/\_\_ \$ \_\_\_\_\_

Where Covid-19 Leave Support Payments have been received for stakeholders (shareholders/partners/trustees/beneficiaries/owners) of the business please provide details of the following:

- Amounts received for each stakeholder
- Whether amounts received were for full-time or part-times

**Have you received a Covid-19 Cultural Sector Emergency Relief Grant or other Covid-19 support payments?**

Please provide details if it is an "other" Covid-19 support payment

Date rec: \_\_/\_\_/\_\_ \$ \_\_\_\_\_

Date rec: \_\_/\_\_/\_\_ \$ \_\_\_\_\_

**Have you received the Covid-19 Small Business Loan?**

Date rec: \_\_/\_\_/\_\_ \$ \_\_\_\_\_



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	\$ _____	
Number of days spent in the property while repairing damages caused by tenants	_____	
Mortgage interest	\$ _____	
Rates	\$ _____	
Insurance	\$ _____	
Repairs/maintenance for general wear and tear	\$ _____	
Other (please give details) :	_____	

**Mixed Use Boat or Plane**

Does this entity have a boat or plane (with a market value of \$50,000 or greater), that is used privately and also to derive income? Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>
If Yes, provide details: Description: _____ Market value: \$ _____	
Was the asset unused for 62 days or more 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 Boat or Plane – Information Required**

The number of days the asset was <b>unused</b> 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	<input type="checkbox"/>
For non-associated persons where payment received is at least 80% of market value:	
Number of days the asset was used: _____	
Income received: \$ _____	<input type="checkbox"/>
Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):	
Cost of advertising for hireage	\$ _____
Cost of repairing damages caused by hireage	\$ _____
Operating costs / supplies	\$ _____
Insurance	\$ _____
Repairs/maintenance for general wear and tear	\$ _____
Other (please give details)	_____

<b>Other Details Required (if applicable)</b>	
<ul style="list-style-type: none"><li data-bbox="156 219 544 248">• Solicitors Settlement Statement</li><li data-bbox="156 277 536 306">• Sale and Purchase Agreement</li><li data-bbox="156 336 587 365">• Loan details for property purchased</li><li data-bbox="156 394 624 423">• A copy of the latest Rateable Valuation</li><li data-bbox="156 452 1249 481">• Any notifications provided to IRD of residential property held on revenue account (taxable on sale)</li><li data-bbox="156 510 1131 539">• A list of chattels with their dates and value for properties bought or sold during the year</li></ul>	<input data-bbox="1422 226 1449 255" type="checkbox"/> <input data-bbox="1422 284 1449 313" type="checkbox"/> <input data-bbox="1422 342 1449 371" type="checkbox"/> <input data-bbox="1422 400 1449 430" type="checkbox"/> <input data-bbox="1422 459 1449 488" type="checkbox"/> <input data-bbox="1422 517 1449 546" type="checkbox"/>

**Thank you for completing this questionnaire  
Don't forget to sign it**