Rental Questionnaire - [31st March 2023]

Ensure this questionnaire is completed and included with your records



Client Name	Phone:	
Date	Email:	

To: [McCullagh and Liu Accountants Limited]

Terms of Engagement

I/We hereby instruct you [McCullagh and Liu Accountants 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 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 [McCullagh and Liu Accountants 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 guery 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 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 authority to act must be signed by all appropriate signatories i.e. all partners in a partnership, trustees in a trust and directors in a company (except where recorded that one director has specific signing authority, or one person has recorded delegated authority from the other owners/members to sign on their behalf). Trustees who are acting as a Trustee in their professional capacity are not required to sign an authority to act, unless all trustees in the Trust are professional trustees, in which case at least one Trustee should sign. See IRD Information Authority for full details of this requirement.

Name	IRD Number	Signature	Date

Director Date of birth City / Town of birth Country of birth Current residential address Froperty Details Please provide us with the addresses of any rental properties you have. Address: Address: Rental Income and Expenditure Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties on the relate to the rental properties on the relate to the rental properties on the rental properties on the relate to the rental properties on the rental properties on the relate to the rental properties on the rental properties on the relate to the rental properties on the rental properties on the relate to the relate to the rental properties on the relate to the rental properties on the relate to the rental properti	Director	IIVES III AUSTIAII	a and is a director of	a company incorpo	orated in Australia:	
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Provide details of any income received from overseas, including rental income Home Office Expenses	Rental Income from Overseas					
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			ng rental income			
Address for Home Office Home Office area: - no change as per previous year	Home Office Expenses					
OR Area used for Business:	If part of your home is set aside princ	ipally for use as an office	/workshop/storage a	rea, p	lease provide the following details:	
Area used for Business:						
Area used for Business:						
Area used for Business:m² Total Area of House & Workshop:m² Actual Cost Method	-	r previous year				
Total Area of House & Workshop:						
Actual Cost Method Power \$		m²				
Power s Insurance (Building & Contents) S Insurance (Building & Contents) S Interest (House Mortgage) Interest		m²				
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Repairs & Maintenance \$	Rates (including regional council rate	s) \$	Rates (including	g regio	onal council rates) \$	
Telephone rental Other S *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 Wage Subsidy or Covid 19 Support payment? (please note all dates and receipts) Date rec: _/_/ \$ Date rec: _/_/ \$ Date rec: _/_/ \$ Date rec: _/_/ \$ Where Wage Subsidy 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 the Covid-19 Leave Support Payments? (please note all dates and receipts) 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	Rent	\$	Rent		\$	
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(shareholders/partners/trustees/beneficiaries/owners) of the business please provide details of the following: • Amounts received for each stakeholder	Date rec:/\$		Date rec://_	\$		
• Whether amounts received were for full-time of part-times			imes			

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Have you received Covid-19 Short-Term Absence Payments	? (please note all	date	s and receipts)	
Date rec:/\$				
Date rec:/\$				
Date rec:/\$				
Where Covid-19 Short-Term Absence Payments have been rece (shareholders/partners/trustees/beneficiaries/owners) of the busi			tails of the following:	
Amounts received for each stakeholder				
Whether amounts received were for full-time or part-time.	es			
Have you received Resurgence Support Payments? (please	note all dates an	d rec	eipts)	
Date rec:/\$				
Date rec:/\$				
Date rec:/\$				
Have you received a Covid-19 Cultural Sector Emergency Re	elief Grant or othe	er Co	vid-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:/\$				
Have any amounts of Covid-19 support payments been repa	id back?			
Please provide details of payment and reason for repayment				
Date paid back:// \$ F	teason:			
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-				
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Residential Land Withholding Tax				ı
Have you sold residential property in New Zealand where Reside				
Withholding Tax has been deducted and paid to the IRD? If so, pe.g. IR1100 Residential land withholding tax return and other sale		Ш		
documents.	o ana paronaco			
Residential Property Sales				
. ,	uiaa datailad aa			
Have you sold any residential property during the year (not other the information provided)?	wise detailed on			
If yes, when was the property purchased?			·	
If it was purchased with 10 years of the sale date,			\$	
 what was the original purchase price 				
• and the sale price?				
•				

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Mortgage Interest Paid on Residential Properties			
Have you incurred interest on residential properties owned (which is not your main family home or 'new build')? Is the interest also against properties other than residential rentals? If so, please provide details of amount of interest and dates paid.			
* A new build is a self-contained residence that receives a Code Compliance Certificate confirming the residence was added to the land on or after 27 March 2020			
Mixed Use Holiday Home			
Does this entity have a property (such as a holiday home or a bach) that is used princome?	rivatel	ly and also to derive	
If yes, provide details of property:	 	Yes 🗌 No 🗌	
Was the property empty for 62 days or more in the income year? If yes, please complete the following section so we can determine the amount of al Mixed Use Holiday Home – Information Required	llowat	Yes ☐ No ☐ ble deductions.	
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 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			
If there is more than one tenant who used the property through the year, please att	tach d	letails.	
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 – deterquired):	tails of	f all expenses will be	
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), the	hat is	·	
derive income?		Yes 🗌 No 🗌	
If Yes, provide details:			
Description:			
Market value: \$			
Was the asset unused for 62 days or more in the income year? If yes, please complete the following section so we can determine the amount of all	llowat	Yes ☐ No ☐ ble deductions.	

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Mixed Use Boat or Plane - Information	n Required			
The number of days the asset was unused	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				
For non-associated persons where payment	received is at least 80% of market value:			
Number of days the asset was used:				
Income received:	\$	_		
required):	(the list below is not exhaustive – details of all exp	enses will be		
Cost of advertising for hireage	\$			
Cost of repairing damages caused by hireag				
Operating costs / supplies				
Insurance				
Repairs/maintenance for general wear and t	ear \$			
Other (please give details)				
Other Details Required (if applic	cable)			
Solicitors Settlement Statement				
Sale and Purchase Agreement				
Loan details for property purchased				
A copy of the latest Rateable Valuation				
Any notifications provided to IRD of residential property held on revenue account (taxable on sale)				
A list of chattels with their dates and	A list of chattels with their dates and value for properties bought or sold during the year			

Thank you for completing this questionnaire Don't forget to sign it on the front page

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