

Please complete this annual questionnaire and provide us with information for your Rental Property.

**Client Name:** \_\_\_\_\_

**Address of rental property:** \_\_\_\_\_

**Year Ended:** \_\_\_\_\_

If property was not rented for a full 12 months.

Please advise why it was vacant, the number of days vacant and the number of days used privately, if any.

Reason-	Days empty-	Days used privately-
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**Rental Income & Expenditure-**

If the property is managed- Please provide details.

Property Management Statements –OR-

Please supply bank statements clearly identifying and detailing all transactions that relate to this property -OR-

Please provide details of the following for each rental property. Use a separate sheet if necessary-

**Income-**

Total rent paid \$

**Expenses-**

Rates \$

Insurance \$

Repairs & Maintenance (Supply details or invoices) \$

Mortgage interest (attach copy of loan summary/statements from bank) \$

Travel \_\_\_\_\_ km

Details of any other expenses – (not included in property management or bank statements)

\$

\$

**Rental property sold, purchased or rental ceased during financial year? YES / NO**

If yes, please provide the following:

- Solicitors settlement statement
- Sale and purchase agreement
- Loan details for property purchased
- A copy of the latest rateable valuation
- A list of chattels ad their value for properties bought or sold during the year.
- If ceased renting- date ceased:

**Code of Compliance-**

Has a Code of Compliance been issued since 27<sup>th</sup> March 2021? YES/ NO

If so, for what work and what date was it issued? (Please provide a copy of the Code of Compliance).

**Date issued:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*I authorise you to prepare my taxation return. I undertake to supply all information necessary for you to perform this work and will be responsible for the accuracy and completeness of such information. You are authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to complete the above assignment. I also authorise you to act as my agent in dealings with all taxation matters with Inland Revenue.*

**Signature:**

**Date:**

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**By doing so, you are acknowledging that you accept the above terms and conditions of the engagement.**

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**Inland Revenue prefers to pay any refunds by direct credit.**

**Please advise the bank account number you would like any refunds deposited to.**

**Bank Account No.**