

Rental Questionnaire - 31 March 2022

Ensure this questionnaire is completed and included with your records

PLEASE ENSURE you fill out the CLIENT NAME box & get ALL APPROPRIATE SIGNATORIES to SIGN the document. (Only fill in any contact details that might have changed recently or you want to reconfirm contact details).

Client Name		Phone:	
Balance Date	31 March 2022	Fax:	
	31 March 2022	Email:	

To: Co-Pilot Accounting Limited

Terms of Engagement

I/We hereby instruct you to prepare our Taxation Returns for the 2022 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 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 Co-Pilot Accounting Limited has the right to charge interest on overdue accounts at the rate of 2% 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 the discretion of Co-Pilot Accounting Limited. I/We accept that any collection costs incurred by Co-Pilot Accounting Limited will be fully recoverable from me/us\. I/We also accept that if I/We are entitled to any refunds from the Inland Revenue Department, then Co-Pilot Accounting Limited may deduct their accountancy fees from that refund if accountancy fees are owing at the time the refund is received. These refunds will be banked into the ASB Co-Pilot Accounting Limited Trust Account, and then a cheque will be written out to Co-Pilot Accounting Limited. We will be supplying you with a statement of transactions for any monies gone through the Co-Pilot Accounting Limited Trust Account for the year ended 31 March 2022, the month after the end of the current financial year

Name	IRD Number	Signature	Date

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Only applicable for companies:

Jnder the Companies Amendment Act 2014 there is now a requirement for all directors to provide their
place of birth and date of birth AND in addition, there must be at least one director that either lives in
New Zealand; or lives in Australia and is a director of a company incorporated in Australia:

Director	Date of birth	City / Town of birth	Country of birth	Current residential address
	'			

Property Details				
Please provide us with the addresses of any rental properties you have.			If a property was not rented for a fe	
Address:			months, please provide details of was vacant.	why it
Address:			- Vao Vaoani.	
Address:				
Rental Income and Ex	nenditure			√
Please supply bank statements OR	clearly identifying and d	etailing all transactions	that relate to the rental properties	
Please provide details of the fo	llowing for each rental pr	operty. Use a separate	sheet if necessary.	
Income:				
Total Rent Received	\$			
Expenses:				
Accounting fees	\$	Phone	\$	
Advertising (to rent)	\$	Power	\$	
Bank fees	\$	Rates	\$	
Insurance	\$	(including regional o	ouncil rates)	
Legal fees	\$	Repairs and Mainter	nance \$	
Management fees	\$	(please attach detai	s or invoices)	
Mortgage Interest	\$	Valuation fees	\$	
(attach copy of loan summary/s	statements from bank)	Water rates	\$	
Details of any other expense re	lating to rental property:			
	·		\$	
			\$	
Details of visits to inspect proper Date Details	erty/conduct property bus	siness:	Kilometres	
Date Details			Kilometres	
				
				
				

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Home Office Expenses					
If part of your home is set aside principal Address for Home Office	pally for use as an office/wor	kshop/storage ar	ea, p	lease provide the	following details:
Home Office area: - no change as per	previous year		,		
<u>OR</u>					
Area used for Business:	m²				
Total Area of House & Workshop:	m²				
Actual Cost Method		OR IRD Square	Metr	e Rate Method (se	ee below note)*
Power	\$	•			,
Insurance (Building & Contents)	\$				
Interest (House Mortgage)	\$	Interest (House	Mort	gage)	\$
Rates (including regional council rates	3) \$	Rates (including	regi	onal council rates)	\$
Rent	\$	Rent			\$
Repairs & Maintenance	\$				
Telephone rental	\$				
Other	\$				
Total	\$				
*Would you like to use the IRD rate? C Rates or Rent costs so we would still I		are metre. This a	llowa	nce doesn't cover	Mortgage Interest,
Covid-19 Wage Subsidy ar	nd Small Business L	oan			
Have you received the Wage Subsidy	? (please note all dates and	receipts)		Date rec:/	/ \$
Have you received Resurgence Supporteceipts)	ort Payments? (please note a	all dates and		Date rec:/	/\$
Have you received the Government S	mall Business Loan?.			Date rec:/	/\$
Residential Land Withhold	ing Tax	-			
Have you sold residential property in N Withholding Tax has been deducted a e.g. IR1100 Residential land withholdi documents.	nd paid to the IRD? If so, pro	vide details			
Residential Property Sales					
Have you sold any residential property the information provided)?	during the year (not otherwi	se detailed on			
If yes, when was the property purchas	ed?				
If it was purchased with 10 years of th	e sale date,			\$	
 what was the original purchase 	se price				
• and the sale price?					
Mortgage Interest Paid on	Residential Properti	es			
Have you incurred interest on resident main family home)? Is the interest als rentals? If so, please provide details of	tial properties owned (which is against properties other the	is not your an residential			

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Mixed Use Holiday Home	e		
Does this entity have a property (si income?	uch as a holiday home or a bach) that is used private	ly and also to derive	
If yes, provide details of property:_		Yes	
Was the property empty for 62 day If yes, please complete the following	s or more in the income year? ng section so we can determine the amount of allowa	Yes ☐ No ☐ ble deductions.	
Mixed Use Holiday Home - In	formation Required		
The number of days the property w	as empty during the income year		
OR where income from any persor	used by family or associated persons* during the inc n received was less than 80% of market rate tives, or if owned by an entity, persons associated with the		
If there is more than one tenant wh	no used the property through the year, please attach	details.	
Name of tenant:			
Relationship to owner (if any):			
Amount of rent they paid:	\$		
Dates rented (From: To)			
Expenses incurred in respect of the required):	e property (the list below is not exhaustive – details o	f all expenses will be	
Cost of advertising for tenants		\$	
Cost of repairing damages caused	by tenants	\$	
Number of days spent in the prope	rty while repairing damages caused by tenants		
Mortgage interest		\$	
Rates		\$	
Insurance		\$	
Repairs/maintenance for general w	vear and tear	\$	
Other (please give details):			

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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 No			
If Yes, provide details: Description:			
Market value: \$			
Was the asset unused for 62 days or more in the income year? Yes No 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 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:	Ш		
Income received: \$			
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)			
Other Details Required (if applicable)			
Solicitors Settlement Statement			
	Ш		
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 value for properties bought or sold during the year			

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

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