

# Rental Questionnaire . 31 March 2017

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2017	Fax:	
		Email:	

To: Shore Chartered Accountants Ltd

## **Terms of Engagement**

I/we hereby instruct you to prepare our Taxation Returns for the 2017 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. You are hereby authorised to 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 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	IRD Number	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. _____ _____ _____





## 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 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: \_\_\_\_\_

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
- Sale and Purchase Agreement
- Loan details for property purchased
- A copy of the latest Rateable Valuation
- A list of chattels with their dates and value for properties bought or sold during the year

Client Questionnaire Rental