

**RENTAL PROPERTY QUESTIONNAIRE  
FOR THOSE USING ACCOUNTING SOFTWARE (EG XERO or MYOB)  
YEAR ENDED 31 MARCH 2020**

**TAXPAYER NAME:** \_\_\_\_\_

The following information is required to be able to complete your income tax return.

For any items that are applicable, please tick the appropriate box and provide the documentation required, or write additional details in the space provided.

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	<u>PLEASE CIRCLE</u>	<u>DOCUMENTS PROVIDED</u>
Do you use accounting software to track your rental property income & expenses?	Yes	No
If yes, please specify accounting package used _____		

**If no, please complete the "Rental Property Questionnaire - No Accounting Software" form instead  
Email [rebecca@millermountfort.co.nz](mailto:rebecca@millermountfort.co.nz) to request this**

For a PC based package (eg MYOB AccountRight, QuickBooks), please ensure we have been provided with a backup of your ledger.  

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**PROPERTY MANAGED BY THIRD PARTY**

Is your rental property managed by a third party (eg real estate agent)? Yes    No  
Please provide a copy of the property manager's annual rental summary showing total rental income, management fees paid, maintenance costs, net received etc.  

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**ADDITIONAL INCOME & EXPENSES**

Have you received any rental payments that have NOT been included in your accounting software? Yes    No

If yes, please advise the amount of rental income    \$ \_\_\_\_\_

Have you paid for any expenses relating to your rental property that have NOT been included in your accounting software? Yes    No

If yes, please advise the amount of expenses paid:

Advertising    \$ \_\_\_\_\_

Body Corporate Fees    \$ \_\_\_\_\_

Gardening & Lawns    \$ \_\_\_\_\_

Insurance    \$ \_\_\_\_\_

Interest (Mortgage)    \$ \_\_\_\_\_

Property Management Fees    \$ \_\_\_\_\_

Rates    \$ \_\_\_\_\_

Water Rates    \$ \_\_\_\_\_

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

Fixed asset purchases (eg appliances) - provide details: \$ \_\_\_\_\_

Other - provide details: \$ \_\_\_\_\_

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**BANK & BORROWINGS**

If you are using a system other than Xero, please provide a copy of the rental property bank account statement(s) as at 31 March. For those using Xero, we can obtain this online.

Are there any borrowings on the property?

Yes      No

Please provide copies of loan summaries/statements for the year showing the balance owing on the loan as at 31 March and the interest paid on the loan during the year

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**OTHER DEDUCTIONS****MILEAGE**

You are able to make a mileage claim for kilometres travelled to and from your rental property for maintenance and property inspections:

Kilometres travelled per trip \_\_\_\_\_ kms

Number of trips \_\_\_\_\_

**HOME OFFICE - FOR TAXPAYERS WITH TWO OR MORE RENTAL PROPERTIES**

You are able to claim a home office allowance ONLY if you own two or more rental properties:

Size of home office room \_\_\_\_\_ m2/ft2

Total size of home \_\_\_\_\_ m2/ft2

Mortgage interest (excl principal repayments) or rent paid \$ \_\_\_\_\_

Insurance - house & contents \$ \_\_\_\_\_

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

Rates - Land \$ \_\_\_\_\_

Rates - Water \$ \_\_\_\_\_

Repairs & Maintenance (eg lawns, cleaners, painting, etc) \$ \_\_\_\_\_

Telephone & Broadband \$ \_\_\_\_\_

**Tip for identifying home office amounts spent during the year:**

Try using the search function in your internet banking to help identify amounts paid in relation to each category above.

For example, search for "Watercare" and use the date range 1 April 2019 to 31 March 2020. This should generate a list of payments made for the year to Watercare.

**MOBILE PHONE CLAIM**

The Residential Tenancies Act states that "A landlord must be reasonably contactable". If you operate a mobile phone to meet your obligations under this Act, please provide details of your monthly phone rental or call charges relating to your rental property

\$ \_\_\_\_\_

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**PROPERTY DETAILS**

Number of months property available for rent \_\_\_\_\_

Do you occupy part of the rental property? Yes No  
If yes, please advise percentage of floor space you occupy \_\_\_\_\_

Have you moved back into your rental property during the year? Yes No  
If yes, please advise the date you moved back into the property \_\_\_\_\_

**PROPERTY SOLD/ACQUIRED DURING THE YEAR**

Have you bought or sold a rental property during the year? Yes No

If yes, please advise:

Property Address \_\_\_\_\_

Sale Price/Purchase Price \$ \_\_\_\_\_

Date of Sale/Purchase \_\_\_\_\_

Please provide copies of the full set of solicitor's settlement statements

If you have had a chattels valuation done for any new property purchased or sold, please provide a copy of the chattels valuation.

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**DECLARATION**

I accept responsibility for the accuracy and completeness of the information supplied in this questionnaire which is to be used in the calculation of my rental income.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_