

**RENTAL PROPERTY QUESTIONNAIRE
FOR THOSE WITH NO ACCOUNTING SOFTWARE
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.

	<u>PLEASE CIRCLE</u>	<u>DOCUMENTS PROVIDED</u>
Do you use an accounting package to track your rental property income & expenses?	Yes	No
If yes, please complete the "Rental Property Questionnaire - Accounting Software" form instead Email rebecca@millermountfort.co.nz to request this		
If no, please provide:		
Copy of cashbook/spreadsheet (if any)		
Copies of all bank statements from 1 April 2019 to 31 March 2020		
Where bank statements only are provided, details of any transactions where it is not obvious what they relate to (eg cheque payments) should be written on the bank statements		

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.		

ADDITIONAL INCOME & EXPENSES

Have you received any rental payments that have NOT been included in your bank statements?	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 bank statements?	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: \$ _____
\$ _____

BORROWINGS

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

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 - ONLY 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 now states "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

\$ _____

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.

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: _____