

RENTAL QUESTIONNAIRE

NAME _____ IRD No _____

Telephone _____ Day Telephone _____ Evening _____

Mobile _____ Mobile _____

Email _____ Fax _____

Nominated Bank Account for Refunds _____

1. PLEASE PROVIDE THE FOLLOWING WHERE APPLICABLE:

	Yes	No	N/A
Copies of all of your bank statements for the year ended 31 st March 2009.			
All cheque and deposit books for the year ended 31 st March 2009			
Other Records (eg Cashbook, disk, memory stick, spread sheets etc)			
New Hire Purchase/Mortgage/Loan Agreements			
GST Returns for the year and Work papers (If Applicable)			
Copy of all ACC Levy Invoices (paid/payable if Applicable)			
Copies of all settlement Statements & legal invoices & papers			
Copies of all Sale & Purchase Agreements.			
Details of personal deposits and withdrawals and bank transfers.			
Printouts from Property Manager			
Do you have Repairs & Maintenance? Please supply Invoices for Repairs & Maintenance over \$500.00			
Do you use your private motor vehicle for business use? If Yes, go to Question 2.			
Do you have a Home Office? If Yes, go to Question 3.			

2. MOTOR VEHICLE REIMBURSEMENT

Do you use your private vehicle for business use? YES/NO

Vehicle Description CC Rating	Kilometers Traveled	Logbook Kept YES/NO

3. USE OF OFFICE AT HOME

Note: If home is privately owned complete questions a to g

If home is a rented property complete questions a, b, d(ii), g & h

- (a) Office area in Square Metres _____
- (b) Total house area in Square Metres _____
- (c) Rates paid for the Year _____
- (d) Insurance Paid for the year
(i) House Insurance _____
(ii) Contents Insurance _____
- (e) Interest Paid on Mortgage for the Year
(As shown on Bank Advice sent to you) _____
- (f) Repairs & Maintenance (List Please)

- (g) Power /Gas expenses for year _____
- (h) Rental paid per week _____

RENTAL PROPERTIES

If you have more than two rental properties, please attach the details on a separate sheet.

	PROPERTY 1	PROPERTY 2
Address:	\$ _____	\$ _____
Gross Rents received	\$ _____	\$ _____
Expenses		
Accounting Expense	\$ _____	\$ _____
Insurance	\$ _____	\$ _____
Mortgage Interest	\$ _____	\$ _____
Legal Fees	\$ _____	\$ _____
Rates	\$ _____	\$ _____
Repairs & Maintenance	\$ _____	\$ _____

Re: Year ended 31 March 2009

I hereby instruct Laurenson Chartered Accountants to prepare my Financial Accounts and Taxation Returns for the period ended 31 March 2009. I undertake to supply all information necessary to carry out these assignments and I accept responsibility for the accuracy and completeness of the information, and therefore you are unable to provide any assurance of my financial statements. I understand your work cannot be relied on to detect error and fraud, and that you accept no liability for the accuracy and completeness of the information supplied to me. I further understand that the financial statements will be prepared at my request and for my purpose only, and that you will not be liable for any losses, claims or demands by any third parties.

Laurenson Chartered Accountants are hereby authorized to communicate with my Bankers, Solicitors, Finance Companies, Accident Compensation Commission and Inland Revenue, to obtain such information as you may require in order to carry out the above assignments, including utilizing IRD Info Express and the new "Look Up Account Information" now available online at the IRD website for Tax Agents.

I acknowledge that I may have to pay tax on 28 August, 15 January, 7 April and 7 May, and that if I have not been advised of such payments, it will be my responsibility to contact you to ascertain if tax is payable.

SIGNED _____

POSITION _____

DATE _____