

2019 RENTAL QUESTIONNAIRE

Financial year ended 31 March 2019



Owners Name: _____

Property Address: _____

To BHW Ltd

I hereby instruct you to prepare my financial accounts and taxation returns for the year/period ending _____.
I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of information provided.

You are hereby authorised to communicate with my Bankers, Solicitors, and Finance Companies and all government agencies to obtain such further information as you may require in order to carry out the above assignment. Our existing Terms of Engagement with BHW Ltd are accepted as applying to this and future assignments until we agree otherwise.

Client's signature _____ Dated: _____

Checklist of Records/Information Required:

Circle Yes or No
Enclosed or N/A

- | | |
|--|----------------------------------|
| 1. Was the property available for rent for the full year?
If no, please state the period it was available for. | Yes / No
<input type="text"/> |
| 2. If a property was purchased or sold during the year
please provide copies of Sale & Purchase agreements
and all copies of solicitor's settlement statements | Enclosed / N/A |
| 3. Copies of Loan/Mortgage Statements for the year
(in particular as at balance date) | Enclosed / N/A |
| 4. Copies of agents Rental Summaries for the full year | Enclosed / N/A |
| 5. Copies of rental account bank statements for the year
If not fully narrated, provide deposit books and cheque butts | Enclosed / N/A |
| 6. If bank statement and/or agents summaries are not available
please complete the schedule over the page | Enclosed / N/A |
| 7. Copies of invoices for assets bought or sold during the year | Enclosed / N/A |
| 8. Where you have a home office, please complete the attached
section | Enclosed / N/A |
| 9. Provide number of Kilometers travelled on rental business during
the year | <input type="text"/> |
| 10. General | |

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Please check the list below to ensure you have provided all the applicable information and return this completed questionnaire with your records. Incomplete information may cause delays in completing your return.

Rental Income and Expenditure Schedule

Please complete this section if you have not provided this information in any other format e.g. bank statements, spreadsheets, real estate agent summaries.

Rental Income

Rents Received \$ _____

Rental Bonds – held by you/paid to tenancy tribunal \$ _____

Expense Reimbursements from tenants \$ _____

Less Expenses

Advertising \$ _____

Administration Costs/ Body Corporate Fees \$ _____

Collection Costs (eg Agents Commission) \$ _____

Insurance \$ _____

Loan/ Mortgage Interest \$ _____

Legal expenses eg refinancing - attach statements) \$ _____

Rates (local body, regional & water) \$ _____

Repairs and Maintenance (attach details) \$ _____

Loan Application Fees/ Valuation Fees \$ _____

Travel Costs \$ _____

Any other relevant expenses \$ _____

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Home Office

If there is a room or an area set aside for use as an office at your home, a claim can be made for the cost of using those facilities.

Electricity	\$
Insurance Home & Contents	\$
Land & Water Rates	\$
Mortgage Interest (not principal)	\$
Rent	\$
Repairs & Maintenance (incl ground maintenance)	\$
Telephone & Internet	\$
Total area of house and garage (sq metres)	
Total area of office (sq metres)	

Confirmation of Contact Details

Postal Address: _____

Email Address: _____

Contact Number(s): _____

Bank Account Details (Required for IRD Refunds)

Bank Account Name: _____

Bank Account Number: _____

THANK YOU

Please make sure all the checklist boxes are complete, you have signed the front page and you have enclosed the records required.