

**Mobile Accounting Services (1994) Ltd**  
**RENTAL QUESTIONNAIRE AND CHECKLIST**  
**FOR THE 2010 TAX YEAR**

Name(s) \_\_\_\_\_

**AUTHORITY**

I authorise Mobile Accounting Services (1994) Ltd to obtain any information necessary to complete the work required. I authorise Mobile Accounting Services (MAS) to prepare a tax return and rental statement(s) from the information and records I have supplied. I do not wish you to complete an audit or review. I accept responsibility for the accuracy and completeness of all records and information supplied, and undertake to review the completed return and advise you of any errors or omissions within 10 days. I authorise MAS to take any outstanding amounts from IRD refund cheques if my account with MAS is overdue. I acknowledge that my tax return will not be e-filed with the IRD until my account with MAS is paid.

Signature: \_\_\_\_\_

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

**(Please note: Your work will not be started until this authority is signed).**



Please complete this questionnaire to ensure all relevant information is collected from you at one time which will see your tax return and rental statement(s) returned to you sooner. Remember our prices are based on you completing this questionnaire correctly and fully.

**PROPERTY DETAILS (one property per questionnaire)**

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

**If applicable please complete below**

(a) Date of Purchase \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ (if in this financial year) \$ \_\_\_\_\_

Do you want to claim depreciation on building? **Yes/No**

(b) Did you previously live in this property? **Yes/No**

(c) Date of Sale \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ (if in this financial year) \$ \_\_\_\_\_

Please provide a copy of any sale and purchase agreements, solicitors statements and a copy of a recent rates demand.

Is your property owned by a company / LAQC / Trust **Yes/No**

If so, we will need to do full company / Trust accounts, please provide:

- Bank statements
- Deposit & cheque books

## RENT RECEIVED

Please provide details of rent received during the year. Either complete the details below or provide a copy of your bank statements showing rent received.

Was the property rented for the full year? **yes/no** Weekly Rent \$ \_\_\_\_\_  
Total rent received for the year \$ \_\_\_\_\_

How many days was your property not available for rent? \_\_\_\_\_  
(e.g. You were residing there, repairs in progress etc)

## EXPENSES INCURRED

You can make a deduction for any expenses relating to the rental property

**Please list ALL expenses that you feel may relate to your rental property below:**

Accounting	\$ _____
Rates	\$ _____
Environmental rates	\$ _____
	Total Rates \$ _____
Insurance	\$ _____
Legal fees (copy of solicitors statements please)	\$ _____
Repairs & maintenance (copy of invoices please)	\$ _____
Details	\$ _____
	\$ _____
	\$ _____
	\$ _____
Other expenses:	e.g. lawns, agent fees, travelling costs, toll calls, advertising, water rates, bank fees
	\$ _____
	\$ _____

## LOANS OR MORTGAGES

Please provide details of interest paid during the period 1/4/09 and 31/3/10 on any loans or mortgages relating to the rental property. Your bank or lender should be able to provide these details NB: Interest is only deductible if you have borrowed the money for purchasing your rental property. The money must be borrowed by the same entity that owns the property.

Lender: \_\_\_\_\_

Account Number/Loan numbers: \_\_\_\_\_

Interest Paid \$ \_\_\_\_\_

Principal Balance as 31 March 2010 \$ \_\_\_\_\_

Did you refinance during the year **Yes/No** \_\_\_\_\_

If so please provide solicitor and bank documents.

## ANYTHING ELSE WE SHOULD KNOW?

If there is anything else relating to your rental property we should know in order to correctly complete your rental statement, please detail below. Also, if there is anything you are unsure about or would like us to clarify then please attach a note.
