

Rental Questionnaire – 1 April 2023 to 31 March 2024

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Email:	

To: Toni Walker Limited

Terms of Engagement

I/We hereby instruct you Toni Walker Limited and staff as applicable to prepare our Taxation Returns for the 2024 year. I/we undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information.

Authority is given to obtain information from Inland Revenue, other government agencies and financial institutions about all tax types (except child support), bank and loan accounts in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels including electronic ones.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us however you are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

Signature:

Date:

PLEASE COMPLETE ONE FORM FOR EACH RENTAL PROPERTY

Property Details	Rental Period	
Please provide us with the addresses of your rental property you have. Address: _____	If a property was not rented for a full 12 months, please provide details of why it was vacant. _____ _____ _____	
Managed Property		
Was this property professionally managed? If yes, please provide copies of all statements from your Property Manager for the year.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Rental Income and Expenditure	✓	
Records Required	✓	Comment
Bank Statements, Cash books, etc		
Where an online accounting system is used (e.g. Xero / MYOB), please provide: ▪ Final bank statement for the year for all bank accounts	<input type="checkbox"/>	
Where a complete computerised accounting system is used (e.g. MYOB), please provide: ▪ A backup of software as at end of financial year (email or USB) ▪ Copy of bank reconciliation as at balance date for all bank accounts ▪ Final bank statement for the year for all bank accounts	<input type="checkbox"/>	
Where a Cashbook (computerised / manual) or no system is used, please provide: ▪ Cashbook (if one is kept) ▪ Bank statements for the full year for all bank accounts	<input type="checkbox"/>	
If you do not operate a separate rental bank account please provide the following information along with supporting documentation; Total Rent Received \$ _____ Total Expenses Paid: Insurance \$ _____ Rates \$ _____ Repairs \$ _____ Mortgage Interest \$ _____ (for expenses in excess of \$1,000 please itemise separately) Travel Expenses: Annual km's travelled in relation to rental property _____ kms		
Loan Statements		
Supply a copy of any loan transaction statements for the financial year up to your balance date.	<input type="checkbox"/>	

Home Office Expenses (if applicable)		
<p>If part of your home is set aside principally for use as an office/workshop/storage area which is used by you in relation to your rental property, you may be able to claim a proportion of your home expenses against your rental income. Please provide the following details:</p> <p>Area used for Business: _____ m²</p> <p>Total Area of House & Workshop: _____ m²</p> <p>Power \$ _____</p> <p>Insurance (Building & Contents) \$ _____</p> <p>Interest (House Mortgage) \$ _____</p> <p>Rates (including regional council rates) \$ _____</p> <p>Repairs and maintenance \$ _____</p> <p>Other \$ _____</p> <p>Total \$ _____</p>		<input type="checkbox"/>
Other Details Required (if applicable)		
<ul style="list-style-type: none"> • Solicitors Settlement Statement • Sale and Purchase Agreement • Loan details for property purchased 		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Thank you for completing this questionnaire
Don't forget to sign it