

# RENTAL

## Supplementary Annual Questionnaire - 2024

Ensure this questionnaire is completed and included with your records:

Client(s)	
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To: Peak Chartered Accountants Limited

### Terms of Engagement - instruction to complete tax returns

I/We hereby instruct Peak Chartered Accountants Limited and staff/contractors as applicable to prepare my/our Taxation Returns (including rental properties) for the year/period ending 31 March 2024. 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.

I/We understand:

- that you will rely upon the information provided by me/us.
- that during preparation of the Taxation Returns you will not be specifically investigating non-compliance with laws and regulations – however, should anything come to light of this nature during this process, you will bring that to my/our attention.
- that the Taxation Returns are prepared for my/our own use and to determine my/our taxation liabilities. If this should change in any material respect, I/we will inform you immediately. You will not accept any responsibility to any person, other than me/us, for the contents of the Financial Statements.

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.

All other terms and conditions of this engagement are the same as those referred to in the original Engagement Letter I/we signed when I/we became a client.

Instructions & Comments (including special contact details, timing):

Have there been any changes in your activities during the past 12 months? If yes, please provide brief details:

Signed By	Position	Date

<b>Property Details</b>	
Please provide us with the addresses of any rental properties you have.	
Address 1 _____	
Address 2 _____	
Address 3 _____	
<b>Rental Income and Expenditure</b>	<input type="checkbox"/>
Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties	
<b>OR Complete Detail Below</b>	

Property Address	Address 1	Address 2	Address 3
<b>Income Received</b>			
Total Rent Received			
Other Income			
<b>Expenses</b>			
Accounting Fees			
Advertising (to rent)			
Bank Fees			
Insurance			
Legal Fees			
Management Fees			
Mortgage Interest (attach copy of loan summary/statements)			
Phone			
Power			
Rates (include regional council rates)			
Repairs & Maintenance (attach details or invoices)			
Valuation fees			
Water Rates			
Other:			
Other:			
Asset purchases (provide details)			

Details of visits to inspect property / conduct property business

Date	Details	Km (and/or costs)

If a property was not rented for a full 12 months, please provide details of why it was vacant.

<b>Rental Income from Overseas</b>		
Provide details of any income received from overseas, including rental income and any tax deducted from this income	<input type="checkbox"/>	
<b>Residential Land Withholding Tax</b>		
Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? If so, provide details e.g. IR1100 Residential land withholding tax return and other sale and purchase documents.	<input type="checkbox"/>	
<b>Residential Property Sales</b>		
<p>Have you sold any residential property during the year (not otherwise detailed on the information provided)?</p> <p>If yes, when was the property purchased?</p> <p>If it was purchased with 10 years of the sale date,</p> <ul style="list-style-type: none"> <li>• what was the original purchase price</li> <li>• and the sale price?</li> </ul>	<input type="checkbox"/>	<hr/> <hr/>
<b>Mortgage Interest Paid on Residential Properties</b>		
<p>Have you incurred interest on residential properties owned (which is not your main family home or 'new build')? Is the interest also against properties other than residential rentals? If so, please provide details of amount of interest and dates paid.</p> <p>* A new build is a self-contained residence that receives a Code Compliance Certificate confirming the residence was added to the land on or after 27 March 2020</p>	<input type="checkbox"/>	
<b>Other Details Required (if applicable)</b>		
<ul style="list-style-type: none"> <li>• Solicitors Settlement Statement</li> <li>• Sale and Purchase Agreement</li> <li>• Loan details for property purchased</li> <li>• A copy of the latest Rateable Valuation</li> <li>• Any notifications provided to IRD of residential property held on revenue account (taxable on sale)</li> <li>• A list of chattels with their dates and value for properties bought or sold during the year</li> </ul>		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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