

## RENTAL PROPERTY SCHEDULE

TAX YEAR: 31<sup>st</sup> MARCH 2020

Name	Trading as
Address of rental property	

Please answer the following questions -		Yes	No
1	Was the property rented or available for rent for the whole year?		
2	If part year, please specify -		
	the start date: _____ the end date: _____		
3	What is the reason for part year?		
4	Is the property to be tenanted to a third party in its entirety?		
5	Is the property a holiday home?		
6	Is the property to be partly used personally and partly tenanted? Please provide details		

### Rental activity for the year 1/4/19 to 31/3/20

Please provide bank statements and copies of invoices/receipts for the items below. If you use a rental agent, please provide us with the yearly summary and monthly reports.

<b><u>INCOME</u></b>		Total for Year
1	Rent received weekly \$...../fortnightly \$...../monthly \$.....	
2	Bond received	
3	Has this bond been lodged with Housing NZ?	
4	Is this bond to be held personally?	
	Was any bond refunded to you to offset against costs?	
	Other income?	

<b><u>EXPENSES</u></b>		Total for Year
1	Advertising	
2	Accountancy fees (only needed for new clients)	
3	Bank charges	

	<b>Expenses continued</b>	
4	Rental agent commission paid. Please send us at least the Year end summary. Please consider asking the agent to email us copies each month.	
5	General expenses/Stationery	
6	Legal expenses (please provide details)	
7	Mortgage/loan interest (please attach statements)	
8	Insurance (please attach a copy)	
9	Rates/Body Corporate (please attach copies)	
10	Other costs	
11	Personal vehicle use (inspection or repair work) can use either method:	
	Total mileage for the year (preferred option)	
	Percentage of running costs. Please provide breakdown of total vehicle running costs.	
	Copy of log book (3 months tested every 3 years)	
12	New assets over \$500 purchased in year	
13	Repairs – please list, provide descriptions and copies of invoices:	

**First year rented** (please provide these property details if this is the first year rented)

Date of property purchase	
Cost Price	
Copy of Sale & Purchase Agreement	
Copy of Solicitors Statement and Statement of Account	
Copy of loan/mortgage documents	

Please provide either

1 – a copy of the property chattel valuation report, or

2 – a list below of the chattels at the property and advise how you have calculated open market values

	Yes	No	Value \$
Carpet			
Wood burner			
Blinds			
Rangehood			
Oven			
Heat pump			
Curtains			
Vinyl			
Dishwasher			
Other			