

# RENTAL PROPERTY QUESTIONNAIRE

NAME

PLEASE COMPLETE AND SIGN THIS  
FORM, THEN CONTACT US TO ARRANGE  
COMPLETION OF YOUR ACCOUNTS &  
TAX RETURN FOR THE

YEAR ENDED 31/3/\_\_\_\_\_

Tick if  
Enclosed

1. Include details of all **Rent receipts and expenditure** related to all rented properties. Indicate clearly what is Repairs & Maintenance and what is Capital Expenditure. Include all Rates Statements.
2. **Mortgage details**, including **Interest statements** showing Interest paid.
3. **Solicitors/Estate Agents statements** from purchase & sale of properties.
4. Total km travelled undertaking tasks related to rented properties.
5. **Fixed Assets**  
Attach details of assets purchased or sold during the year. Include a copy of any Purchase/HP agreements, chattels valuations, etc.
6. **Home Office** (If Applicable)  
Do you have an area set aside at Home as a Business Office? **YES/NO**  
If YES, please complete the following:

Annual Power	\$.....
" Rent or Rates	\$.....
" Repairs & Maintenance	\$.....
" Interest on Mortgage	\$.....
" Insurance (House & Contents)	\$.....
" Annual Phone Rental	\$.....
" Internet Costs/% Used for Business	\$..... %
" Business Toll Calls	\$.....
Size of Office & Work Areas	.....sq ft/M
Total size of all buildings & work areas	.....sq ft/M

## TERMS OF ENGAGEMENT

I/We authorise **Optimal Business Services Ltd** to act as our agent for all Tax Revenues and Types. We accept responsibility for the accuracy & completeness of the information supplied which is used in the preparation of our financial statements and/or tax returns. Optimal Business Services Ltd are not required to complete an audit and we accept therefore that their work cannot be relied upon to detect error or fraud. We further understand that the financial statements will be prepared at our request and for our purposes only and that Optimal Business Services Ltd or their employees will not be liable for any losses, claims or demands by any third person.

We further acknowledge that payment for fees in relation to the work undertaken will be made once an invoice is issued. **Note that, any related Tax Returns will not be sent to the IRD for processing, and no further work will be undertaken by us, until full payment for the invoice is received.**

.....  
**Clients Signatures**

Once this form is completed, please contact us to arrange a time to drop the records.

**OPTIMAL BUSINESS SERVICES LTD**

Member, Taxation Institute of NZ

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