

RENTAL QUESTIONNAIRE 2025

Please complete & return with your records

Client Name	IRD #
Balance Date	Mobile
Email	Phone
Address	

To: Miller Gale Winter

Terms of Engagement

I/We hereby instruct you to prepare my/our Financial Statements and Taxation Returns for the 2025 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. I/We understand that you will rely upon the information provided by me/us. Your services are not intended to, and accordingly will not result in the expression by you of an opinion on the Financial Statements in so far as third parties are concerned, or in the fulfilling of any statutory audit requirements. I/We understand that during preparation of the Financial Statements and 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.

I/We understand that the Financial Statements and 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.

I/We also accept that you have the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I/We accept that any collection costs you incur will be fully recoverable from me/us.

You are hereby authorised to communicate with my/our bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to complete the above assignments. You are authorised to obtain information for all tax types from Inland Revenue through all channels, including electronic.

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.

All other terms and conditions of this engagement are the same as those referred to on the Miller Gale & Winter website www.millergale.co.nz

Signature	Date
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Tax Refunds

Please provide the bank account that you would like any tax refunds credited into.

Bank Account Number

RECORDS REQUIRED



Property Details	Property Vacancy
Please provide us with the addresses of any rental properties you have.	If a property was not rented for a full 12 months provide details why it was vacant.
Property 1 _____	
Property 2 _____	
Property 3 _____	
Property 4 _____	

Rental Income and Expenditure
Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties
OR Please provide details of the following for each rental property. Use separate sheets if necessary.

Income	Total Rent Received	\$ _____		
Expenses	Accounting fees	\$ _____	Phone	\$ _____
	Advertising (to rent)	\$ _____	Power	\$ _____
	Bank fees	\$ _____	Valuation Fees	\$ _____
	Insurance	\$ _____	Water rates	\$ _____
	Legal fees	\$ _____	Rates	\$ _____
	Management fees	\$ _____	<i>(Including Regional Council rates)</i>	
	Mortgage Interest	\$ _____	Repairs & Maintenance	\$ _____
	<i>(Attach copy of loan summary or statements from bank)</i>		<i>(Attach details or invoices)</i>	

Details of any other expense relating to rental property

	\$ _____
	\$ _____
	\$ _____

Details of visits to inspect property/conduct property business - Date | Details | Kilometres traveled

		_____ km
		_____ km
		_____ km
		_____ km
		_____ km
		_____ km

RECORDS REQUIRED **Comments**

Other Details Required (if applicable)

Solicitors Settlement Statement

Sale and Purchase Agreement

Loan details for property purchased

A copy of the latest Rateable Valuation

A list of chattels with their dates and value for properties bought or sold during the year

Additional Comments

Large empty text area for additional comments.

Thank you for completing this questionnaire