

# Rental Questionnaire

## For the year ended 31<sup>st</sup> March 2024

Please ensure this questionnaire is completed and included with your records

Client Name:		Phone:
Balance Date:		Cellphone:
Email:		
Physical Address:		
Postal Address:		

To: Tax Matters Limited

You are hereby authorised to communicate with my/our bank, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the preparation of my/our financial statements and tax returns.

I/We authorise you to act as my/our Agent for Inland Revenue Department matters, and to have access to all tax types and all tax information pertinent to the completion of my financial statements and tax returns.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Records Required	<input checked="" type="checkbox"/>	Comment
From 1 <sup>st</sup> April 2023 to 31 <sup>st</sup> March 2024		
<b>Electronic Data</b>		
If you are providing your financial data in electronic form, please advise the password ..... Please provide a copy of your data email to us. Please provide a copy of the year end bank statement and the bank reconciliation at that date.		
<b>Bank Statements, Cheque Books, Deposit Books</b>		
Please make sure they are all there and that all cheques and deposits are clearly identified as to what they are.	<input type="checkbox"/>	
<b>RENT RECEIVED</b>		
Where you employ a Property Manager, please supply copies of their monthly or annual rental summaries.	<input type="checkbox"/>	
<u>OR</u> Where you do not employ a Property Manager, please supply bank statements highlighting rental deposits	<input type="checkbox"/>	



**Sale of Rental Property**

Did you sell your rental property during the financial year?

Yes  No

If "Yes" please supply the following details:

- Copy of your solicitors settlement statement and Sale & Purchase agreement.
- Copy of the valuation report if applicable, at the date of purchase
- A final loan statement showing loan balance paid off.

**Other Information**

Details of anything else we should be aware of in relation to the preparation of your accounts. i.e. tax return

Wages or ACC payments.

N.Z Superannuation & overseas pensions.

We will email you a PDF copy of your accounts. If you require a printed copy, please advise.

Accounts bound and posted

If you have any questions regarding this form, please do not hesitate to contact us:

Please return this slip and all necessary documents to us in person at our physical address, via post or email.

**Tax Matters Limited**

**Physical:** Unit 3/245 St Asaph Street Christchurch 8011 or

**Postal:** P O Box 13400, City East, Christchurch 8141

**Phone:** (03) 366 6115

**Fax:** (03) 366 4798

**Email:** debbie@taxmatters.net.nz

**Thank you for completing this questionnaire  
Don't forget to sign on page 1**

Can we assist you in any way, or is anything you would like to discuss:	Yes
Assistance with tax planning	<input type="checkbox"/>
Would you like Tax Matters to look after GST/RWT/Payroll returns (if not already)	<input type="checkbox"/>
Assistance with budgets / cashflow forecast	<input type="checkbox"/>
Preparation of regular financial reports (monthly, quarterly)	<input type="checkbox"/>
Regular meetings to improve business performance	<input type="checkbox"/>
Identifying your future direction with a strategic plan and a business plan	<input type="checkbox"/>
Assistance with a succession plan	<input type="checkbox"/>
Preparation of business for sale	<input type="checkbox"/>
Due diligence for purchase of a business	<input type="checkbox"/>
Any accounts receivable issues you would like assistance with resolving / collection	<input type="checkbox"/>
Funding requirements, working capital or asset finance	<input type="checkbox"/>
Any specific business problems you would like to discuss, or matters you wish to raise	<input type="checkbox"/>