

Rental Questionnaire – 31 March 2022

(not owned within a company)



Please ensure this questionnaire is completed and included with your records

Client Name		Phone	
		Mobile	
Balance Date		Email	
		IRD number	

To: Bella Consultants Limited

Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the year/period ending 31 March 2022. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require for completion of the above assignment.

You are to represent me as my tax agent. Authority is given to obtain information from the Inland Revenue about all tax types (except NCP or CPR) until further notice. This includes obtaining information through all Inland Revenue media and communication channels.

I also accept that Bella Consultants Limited has 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 the discretion of Bella Consultants Limited. I accept that any collection costs incurred by Bella Consultants Limited will be fully recoverable from me.

Privacy Act 1993

1.1 The Landlord and the guarantor/s (if separate to landlord) authorise Bella Consultants Limited to:

- a) collect, retain and use any information about myself and/or guarantors, for the purpose of assessing the landlord and/or guarantors creditworthiness; and
- b) disclose information about the landlord and/or guarantors, whether collected by Bella Consultants Limited from myself and/or guarantors directly or obtained by Bella Consultants Limited from any other source, to any other credit provided or any credit reporting agency for the purposes of providing or obtaining a credit reference, debt collection or notifying a default by the landlord and/or guarantors.

1.2 Where the landlord and/or the guarantors are an individual the authorities under clause 17.1 are authorities or consents for the purposes of the Privacy Act 1993.

1.3 The landlord and/or the guarantors shall have the right to request Bella Consultants Limited for a copy of the information about myself and/or guarantors retained by Bella Consultants Limited and the right to request Bella Consultants Limited to correct any incorrect information about the landlord and/or guarantors held by Bella Consultants Limited.

Personal Guarantee

Where the name of a guarantor is completed at the foot of this agreement, then that person personally guarantees full payment of any amounts due to us in terms of this agreement.

Signature _____

Date _____

Name / Guarantor _____

Property Details

Please provide us with the addresses of any rental properties you have.

1. Address: _____
2. Address: _____
3. Address: _____
4. Address: _____

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

Rental Income and Expenditure

Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties for the entire year 1 April 2021 to 31 March 2022

OR

Please provide details of the following for each rental property. Use a separate sheet if necessary.

Income:

Total Rent Received \$ _____

Expenses:

Rates \$ _____

Insurance \$ _____

Repairs and Maintenance (please attach details or invoices) \$ _____

Mortgage Interest (please attach copies of loan statements from bank – showing interest) \$ _____

Details of any other expense relating to rental property:

	\$ _____
	\$ _____
	\$ _____
	\$ _____
	\$ _____
	\$ _____

Details of visits to inspect property / conduct property business:

Date	Details	Kilometres
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Other Details Required

- Solicitors Settlement Statement
- Sale and Purchase Agreement
- Loan details for property purchased
- A copy of the latest Rateable Valuation
- A list of Chattels and their value for properties bought or sold during the year
- **Copy of personal guarantees for company mortgages**
- **Statement of personal worth which is at risk by the personal guarantees**

Bank account details for tax refunds

Account name: _____

- - -

Bank

Branch

Account

Suffix

Thank you for completing this questionnaire

It is essential we receive all the above information to prepare the 2022 financial accounts

Don't forget to sign it