Lockhart O'Shea Ltd. RENTAL QUESTIONNAIRE

\$

\$

\$

Legal fees

Management fees

Mortgage Interest

Please list below your rer	ital property addresses:				
Address:					
Address:					
Address:					
		and the state of t			
if a property was not reni	ed for a full 12 months, ple	ase provide details of why i	t was vacar	it.	
	or sold during the financia ide the following informatio	•		Yes	No
Solicitors Settlement Sta					
Sale and Purchase Agree	ement				
• Loan details for propert	y purchased				
• Valuation of chattels (if	undertaken)				
Residential Property Sales					
Have you sold any residential property that was not your family home during the year			No		
(not otherwise detailed on the information provided)?					
If yes, when was the property purchased? Date:			-		
what was the original purchase price? and the sale price? sale price?			-		
and the sale price? Has the central property been used as your main home at any point? Ves. □ N			No		
Has the rental property been used as your main home at any point? □ Yes □ No					
Rental Income and Expend					
	summary if the property/ies h fying and detailing all transaction	_		operty mana	ger or
	ollowing for each rental proper	ty. Use a separate sheet if nec	essary.		
Income:					
Total Rent Received	\$				
Expenses:					
Accounting fees	\$	Phone		\$	
Advertising (to rent)	\$	Power		\$	
Bank fees	\$	Rates \$			
Insurance	\$	(including regional council rates)			

\$

\$

Repairs and Maintenance

Valuation fees

(please attach details or invoices)

(attach copy o	tach copy of loan summary/statements from bank) Water rates \$			\$			
Details of any other expense relating to rental property:							
			\$				
			\$				
Details of visit	s to inspect property/cond	duct property busines	s:				
Date	Date Details			Kilometers			
			<u> </u>				
Mortgage Inte	erest						
		ntroduced an interest l	imitation rule designed to red	duce invest	or demand for		
residential pro	perty to address housing a	ffordability.	_				
As a result of t	his change, we will require	full year mortgage sta	tements showing interest pa	yments mo	onth by month.		
Home Office I	Expenses (Only complete if	you own multiple prop	perties)				
-		=	workshop/storage area which		-		
	operty, you may be able to llowing details:	claim a proportion of	your home expenses against	your rentai	income. Please		
-	_						
Address for Home Office							
Home office area - Same as prev. year □ Yes □ No							
16 1							
if no, please pi	rovide updated home office	e areas below.					
Area used for	Business:	m^2					
Total Area of L	Jauca & Warkshan	m²					
TOTAL ALEA OLF	louse & Workshop:	m²					
	•	•	will be claimed by your busing		-		
-	tion. This uses a rate that IF e New Zealand household.	RD set each year based	on the average cost of utiliti	es per squa	are metre of housing		
ioi tile averagi	e New Zealand Household.						
The current IR	D rate (2022-2023) is \$51.0	05 per square metre.					
Actual Cast 84	athad	OP	IDD Courses Markes Data 84-44	and /ana h	Now note)		
Actual Cost M	etnoa	1	IRD Square Metre Rate Meth	noa (see be	elow note)		
Power	LB 00	\$					
	Iding & Contents)	\$			_		
Interest (Hous		\$	Interest (House Mortgage)		\$		
	ng regional council rates)	\$	Rates		\$		
Rent		\$	Rent		\$		
Repairs and M	aintenance	\$					
Other – Please	especify	\$					
Total		\$					

Mixed Use Holiday Home				
Are any of your rental properties a holiday home or a bach that is used privately and also to derive income? Ves □ No				
If yes, provide details of property:				
Was the property empty for 62 days in the income year? □ Yes □ No				
If yes, please complete the following section so we can determine the amount of allowable deductions.				
Mixed Use Holiday Home – Information Required				
The number of days the property was empty during the income year The number of days the asset was used by family or associated persons* during the income year. OR where income from any person received was less than 80% of market rate * Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property.				
If there is more than one tenant who used the property through the year, please attach details.				
Name of tenant:				
Relationship to owner (if any):				
Amount of rent they paid: \$				
Dates rented (From: To)				
Mixed Use Holiday Home conts.				

Mixed Use Holiday Home conts.		
Expanses insured in respect of the property.		
Expenses incurred in respect of the property:		
Cost of advertising for tenants	\$	
Cost of repairing damages caused by tenants	\$	
Number of days spent in the property while repairing damages caused by tenants	\$	
Mortgage interest	\$	
Rates	\$	
Insurance	\$	
Repairs/maintenance for general wear and tear	\$	
Other (please give details):		
Mixed Use Boat or Plane		
Does this entity have a boat or plane (with a market value of \$50,000 or greater), that privately and also to derive income?	: is used	□ Yes □ No