Lockhart O'Shea Ltd. RENTAL / PROPERTY QUESTIONNAIRE

\$

\$ see below

Management fees

Mortgage Interest

Please list below your ren	ital property addresses	:					
Address:							
Address:							
Address:							
If a property was not rent	tad for a full 12 months	nloaco pr	ovido dotails of why it	was vasar	^+		
if a property was not rem	ted for a full 12 months	s, piease pro	ovide details of wify it	was vacai	π.		
Rental property purchased		-	_		Yes	No	
(if applicable - please provide the following information)							
Solicitors Settlement Sta Sala and Burshase Agree							
Sale and Purchase Agreement							
 Loan details for property purchased Valuation of chattels (if undertaken) 							
• Valuation of chatters (if	undertakenj						
Residential Property Sales		f :		- V	N1 -		
Have you sold any residential property that was not your family home during the year (not otherwise detailed on the information provided)?			ne during the year	□ Yes □	No		
If yes, when was the property purchased?				Date:			
what was the original purchase price?				\$			
and the sale price? \$							
Has the property been used as your main home at any point?			□ Yes □ No				
Rental Income and Expend	iture						
Please supply the year end tax bank statements clearly identi OR Please provide details of the fo	fying and detailing all tran	nsactions tha	t relate to the rental pro	perties.	operty mana	ger or	
Income:		' '	•	,			
Total Rent Received	\$						
Expenses:							
Accounting fees	\$		Phone \$		\$	\$	
Advertising (to rent)	\$		Power	\$			
Bank fees	\$		Rates	\$			
Insurance	\$		(including regional cour	cil rates)			
Legal fees	\$		Repairs and Maintenance \$		\$		

(please attach details or invoices)

Valuation fees

\$

(attach cop	y of loan summary/statement	ts from bank)	Water rates		\$	
Details of a	any other expense relating to	rental property:				
				\$		
				\$		
Details of v	risits to inspect property/cond	duct property busines	s:			
Date	Details			Kilometers		
Mortgage I	nterest					
	il 2021, the government has in	ntroduced an interest	limitation rule designed to re	educe inves	tor demand for	
residential	property to address housing a	affordability.	•			
	of this change, we will require arged for the year.	tull year mortgage sta	atements, or an annual sumn	nary showir	ng total mortgage	
	arged for the year.					
Homa Offi	co Evenence (Only complete the	f.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	nartical			
	ce Expenses (Only complete if our home is set aside principal			h is used by	v vou in relation to	
-	property, you may be able to	•		-	•	
-	following details:		, 1	,		
Address for	r Home Office					
, (44, 655 161	Thomas of the					
Home office	e area - Same as prev. year	□ Yes □ No				
If no, please	e provide updated home offic	e areas below.				
Araa usad f	for Business:	m²				
Area used t	for Business:	m-				
Total Area	of House & Workshop:	m²				
Instead of v	working out how much of you	r household expenses	will be claimed by your busin	ness, vou ca	n use the square	
	option. This uses a rate that II	•		-	•	
for the ave	rage New Zealand household.					
The current	t IRD rate is \$53.10 per square	e metre.				
Actual Cost	t Method		IRD Square Metre Rate Met	:hod		
Power		\$				
Insurance (Building & Contents)	\$			1	
Interest (Ho	ouse Mortgage)	\$	Interest (House Mortgage)		\$	
Rates (inclu	uding regional council rates)	\$	Rates		\$	
Rent		\$	Rent		\$	
Repairs and	d Maintenance	\$				
Other – Ple	ease specify	\$				
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? \Box Yes \Box 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.			
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, plane or helicopter (with a market value of \$50,000 or green privately and also to derive income?	□ Yes	□ No	