

Rental Summary



Please complete this form and provide the required records for each tax year you have received income from rental property ownership or as directed by your case manager.

Your Details

First Name(s)	<input type="text"/>		
Last Name	<input type="text"/>		
WooHoo ID or IRD Number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date of Birth	<input type="text"/> DD / <input type="text"/> MM / <input type="text"/> YYYY
Email Address	<input type="text"/>		
Mobile	<input type="text"/>		
Address	<input type="text"/>		
Suburb	<input type="text"/>	Town/City	<input type="text"/>
Postcode	<input type="text"/>		

Tax Return Details

Tax Year ending 31 March	<input type="text"/>	Are you GST Registered?	<input type="radio"/> Yes	<input type="radio"/> No
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Property Details

Please complete this form for each rental property you own.

Street Address	<input type="text"/>		
Suburb	<input type="text"/>	Town/City	<input type="text"/>
Postcode	<input type="text"/>		
Property Purchase Date	<input type="text"/> DD / <input type="text"/> MM / <input type="text"/> YYYY	Property Sale Date	<input type="text"/> DD / <input type="text"/> MM / <input type="text"/> YYYY
Please provide a copy of your Sale & Purchase Agreement		Please provide a copy of your Sale & Purchase Agreement	

Please describe the ownership of this property:

- | | |
|---|--|
| <input type="radio"/> I am the sole owner | <input type="radio"/> The property is owned by a trust |
| <input type="radio"/> I am a joint owner | <input type="radio"/> The property is owned by a company |

Rental Activity Details

Total Rent Received	<input type="text" value="\$"/>	Date first available for rent	<input type="text" value="DD / MM / YYYY"/>
Total Bond Received	<input type="text" value="\$"/>	Date of first rent payment	<input type="text" value="DD / MM / YYYY"/>

Please describe the period the property was rented:

Rented for the full year?	<input type="radio"/> Yes <input type="radio"/> No	Date Rented From	<input type="text" value="DD / MM / YYYY"/>
How many days was the property untenanted, if any?	<input type="text"/>	Date Rented To	<input type="text" value="DD / MM / YYYY"/>

Please select and provide **one** of the following in relation to this property:

- A spreadsheet that clearly details rent payments
- Rental account bank statements that clearly detail rent payments
- Statements/reports from your property manager that clearly detail rent payments
- Bank statements that clearly detail rent payments
- Name and contact details for your property manager (for WooHoo to contact directly and request rent payment details)

Property Manager Name	<input type="text"/>		
Property Manager Email	<input type="text"/>	Property Manager Phone	<input type="text"/>

Please list dates and purposes of visits the property i.e. inspections or other property business:

<input type="text" value="DD / MM / YYYY"/>	<input type="text"/>
<input type="text" value="DD / MM / YYYY"/>	<input type="text"/>
<input type="text" value="DD / MM / YYYY"/>	<input type="text"/>
<input type="text" value="DD / MM / YYYY"/>	<input type="text"/>
<input type="text" value="DD / MM / YYYY"/>	<input type="text"/>
<input type="text" value="DD / MM / YYYY"/>	<input type="text"/>
<input type="text" value="DD / MM / YYYY"/>	<input type="text"/>
<input type="text" value="DD / MM / YYYY"/>	<input type="text"/>

Fixed Assets

Please list all assets and/or chattels for the property that were purchased (if over \$500) or sold during the tax year.

Asset/Chattel	Purchase Date	Sale Date	Amount
Dishwasher	DD / MM / YYYY	DD / MM / YYYY	\$
Drapes	DD / MM / YYYY	DD / MM / YYYY	\$
Floor coverings	DD / MM / YYYY	DD / MM / YYYY	\$
Oven	DD / MM / YYYY	DD / MM / YYYY	\$
Washing machine	DD / MM / YYYY	DD / MM / YYYY	\$
	DD / MM / YYYY	DD / MM / YYYY	\$
	DD / MM / YYYY	DD / MM / YYYY	\$
	DD / MM / YYYY	DD / MM / YYYY	\$

Expenses

You can claim business expenses that directly relate to managing your rental property and offset them against your income. Please list your applicable expenses below and provide copies of receipts, statements, or invoices of the payments.

Advertising	\$	Legal Fees	\$
Accounting & Tax Preparation	\$	Other Expenses	\$
Bank Fees	\$	Property Management Fees	\$
Body Corporate Levies	\$	Rates (regional and district)	\$
Cleaning	\$	Repairs & Maintenance	\$
Gardening	\$	Subscriptions	\$
Insurance	\$	Valuation Fees	\$
Interest Paid on Mortgage	\$	Water Rates	\$

Vehicle Mileage

There are **two** methods to calculate claims for vehicle running costs: Actual business distance as recorded daily in a logbook OR business use percentage as calculated after keeping a logbook for 90 consecutive days. Please complete **one** of the following.

Actual Business Distance Method:

Total Distance for Year km

Business Distance for Year km

Please provide a copy of your logbook

Business Use Percentage Method:

Total Distance for Year km

Business Use Percentage %

Please provide a copy of your logbook

Home Office Details

If you use part of your home for your business you may be able to claim a percentage of running costs as a business-related expense. Please list your applicable home office expenses below and provide copies of statements or receipts of the payments.

Electricity & Gas \$

Home & Contents Insurance \$

Interest Paid on Mortgage \$

Internet \$

Total Area of Home m²

Area of Home Office m²

Area of Garage (if applicable) m²

Rates \$

Rent (if applicable) \$

Repairs & Maintenance \$

Water Rates \$

Avg. Time Spent Working from Home Office (per week) hours

No. Vehicles Usually Parked in Garage (if applicable)

Other Required Information

Please provide the following information for this property or as directed by your case manager.

- Copy of all loan or mortgage agreements
- Copy of all loan or mortgage statements showing interest and principal breakdown, and closing balance, for the tax year
- Copy of Settlement Statement(s) for the purchase and sale (if applicable) of the property
- Copy of Sale and Purchase Agreement(s) for purchase and sale (if applicable) of the property
- Copy of any other financing documentation
- Copy of Rates Demand
- Copy of any valuations (including chattels if applicable)
- Copies of invoices or other details for all repairs or maintenance expenses indicated on this form
- Copies of receipts and/or statements for all expenses indicated on this form

Additional Information or Comments

If you have any comments or additional information, including expenses, that you think may be relevant to your tax return or account, please tell us about them here.

Acknowledgement and Agreement

I authorise WooHoo NZ Tax Refunds to complete and filing any necessary income tax returns on my behalf. I confirm that the information included in this form, and provided as requested, is complete, true and correct.

I also authorise WooHoo NZ Tax Refunds to seek any additional information they may require for the purpose of preparing and completing my financial statements, annual accounts and income tax returns. This includes information from the Companies Office, Solicitors, Employees, Banks or other financial institutions, Property Managers, and other Advisors, and I hereby authorise my Solicitors, Employees, Banks or other financial institutions, Property Managers, and Advisors to supply such information.

Your Signature

Date

DD / MM / YYYY

We're Here to Help

If you have any questions or need a hand, just get in touch! Send us an email to taxteam@woohoo.co.nz or you can chat directly with our support team at www.woohoo.co.nz

Contact Information

Postal Address

WooHoo NZ Tax Refunds Ltd
PO Box 28125
Christchurch 8242

Email

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