

Rental Summary



Personal Tax

The Smart Kiwi Choice!

A Division Of Kiwi Financial Services Limited.



If you are applying for a tax refund with us and have income from a rental property, we require you to complete this simple form, sign it and return it to us with copies of all the material that we have outlined.

Individual Tax Return

Full name

IRD No.

Financial year

The Property

Address of property rented

Period the property was available for renting (months)

Please provide one of the following

Purchase date of the property (day/month/year)

(Please provide a copy of the Sale and Purchase Agreement and the Settlement Document)

- only if this is your first return with us

OR

Date made available for rent (day/month/year)

(Please provide a copy of the Rental Agreement)

Rental Income

Date rental income started (day/month/year)

Please provide one of the following:

- Bank statements highlighting the rental income
- A spreadsheet detailing the rental income
- Statements from the property manager

Total Rental Income \$

Please note that amounts received from the Tenancy Bond Centre for payment of damages, rent arrears etc. are to be included as income.

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Expenses

General Expenses

Rates	<input type="text" value="\$"/>
Insurance	<input type="text" value="\$"/>
Interest on mortgage	<input type="text" value="\$"/>
Fees to Property Manager	<input type="text" value="\$"/>
Previous Accountant's Fees	<input type="text" value="\$"/>
Legal Fees	<input type="text" value="\$"/>

Motor Vehicle Expenses

If you use your own vehicle in the course of renting out your property, you may be able to claim some vehicle running costs as an expense, for example, travelling to inspect the property or do some repairs.

Distance travelled between home and rental property	<input type="text"/>	km
Number of trips to rental property	<input type="text"/>	

Fixed Asset Expenses

These are for assets over \$500, please provide receipts for each.
If you have further assets, please continue on the additional sheet provided.

<hr/>	<input type="text" value="\$"/>

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Repairs & Maintenance

If you have further repairs and maintenance, please continue on the additional sheet provided.

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

Other Assets Expenses *(please provide details)*

If you have further assets and/or expenses, please continue on the additional sheet provided.

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

If your previous year's tax return was filed by an accountant, please provide us with a copy of the set of accounts

I, (name) _____, authorise Kiwi Personal Tax (Kiwi Accountant) to complete any IR3 tax returns necessary, and to file tax returns on my behalf.

I hereby certify that the statements and information in this form are true and correct.

Your signature

Date / / (day/month/year)

**Please do not forget to sign this document.
Please email to info@kiwipersonaltax.co.nz**