

TERMS OF ENGAGEMENT AND DETAILS FOR RENTAL TAX RETURN

Full Name:			
Address:			
IRD Number:		Email:	Phone Numbers:
Refunds to be deposited to Bank Account Name:		Bank Account Number:	

I request Quantum to process and file my tax return for the year ended 31 March on the following basis:-

Please add further details if any of the following apply:

IRD Summary of Earnings	Income should be shown from the following sources:																																																																			
Details of any interest or dividends income received during the above year	<table border="1"> <thead> <tr> <th>Paid by</th> <th>Tax Deducted</th> <th>Gross Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>\$</td> <td>\$</td> </tr> <tr> <td></td> <td>\$</td> <td>\$</td> </tr> <tr> <td></td> <td>\$</td> <td>\$</td> </tr> </tbody> </table>	Paid by	Tax Deducted	Gross Amount		\$	\$		\$	\$		\$	\$																																																							
Paid by	Tax Deducted	Gross Amount																																																																		
	\$	\$																																																																		
	\$	\$																																																																		
	\$	\$																																																																		
<p>Details of Rental Property Income</p> <p>Full Details provided on separate sheet with supporting information if necessary.</p> <p>If Property is held jointly with any other person or has been used privately during the year please advise details</p> <p>Please also advise date of property purchase</p> <p>And age in years of the building</p>	<table border="1"> <tr> <td>Property Address</td> <td colspan="2"></td> </tr> <tr> <td>Rental Income Received</td> <td>period rented from</td> <td>to \$</td> </tr> <tr> <td>Expenses</td> <td></td> <td></td> </tr> <tr> <td>Interest on Mortgage</td> <td>\$</td> <td></td> </tr> <tr> <td><small>for money borrowed to purchase rental property, exclude principal payments, send statement to confirm amount paid during the year and balance at end of year) Given interest deductibility rules we need full details of when the interest was paid.</small></td> <td></td> <td></td> </tr> <tr> <td>Bank Fees</td> <td>\$</td> <td></td> </tr> <tr> <td>Insurance</td> <td>\$</td> <td></td> </tr> <tr> <td>Legal Fees on Sale, Purchase or refinance</td> <td>\$</td> <td></td> </tr> <tr> <td><small>(note details) include legal statements for our review</small></td> <td></td> <td></td> </tr> <tr> <td>Low Value Asset Purchases (e.g. stove <\$500)</td> <td>\$</td> <td></td> </tr> <tr> <td>Real Estate Agent Management Fees</td> <td>\$</td> <td></td> </tr> <tr> <td>Rates (property and water)</td> <td>\$</td> <td></td> </tr> <tr> <td><small>(note details)</small></td> <td></td> <td></td> </tr> <tr> <td>Repairs & Maintenance</td> <td>\$</td> <td></td> </tr> <tr> <td><small>(note details of any capital expenditure separately)</small></td> <td></td> <td></td> </tr> <tr> <td>Tax Return Preparation Fee</td> <td>\$</td> <td></td> </tr> <tr> <td>Travel relating to Rental Property Inspections</td> <td>\$</td> <td></td> </tr> <tr> <td><small>(note details)</small></td> <td></td> <td></td> </tr> <tr> <td>Other Rental Property Expenses</td> <td>\$</td> <td></td> </tr> <tr> <td><small>(note details)</small></td> <td></td> <td></td> </tr> <tr> <td>Capital Asset Purchases or Property Improvements</td> <td>\$</td> <td></td> </tr> <tr> <td><small>(note details)</small></td> <td></td> <td></td> </tr> </table>	Property Address			Rental Income Received	period rented from	to \$	Expenses			Interest on Mortgage	\$		<small>for money borrowed to purchase rental property, exclude principal payments, send statement to confirm amount paid during the year and balance at end of year) Given interest deductibility rules we need full details of when the interest was paid.</small>			Bank Fees	\$		Insurance	\$		Legal Fees on Sale, Purchase or refinance	\$		<small>(note details) include legal statements for our review</small>			Low Value Asset Purchases (e.g. stove <\$500)	\$		Real Estate Agent Management Fees	\$		Rates (property and water)	\$		<small>(note details)</small>			Repairs & Maintenance	\$		<small>(note details of any capital expenditure separately)</small>			Tax Return Preparation Fee	\$		Travel relating to Rental Property Inspections	\$		<small>(note details)</small>			Other Rental Property Expenses	\$		<small>(note details)</small>			Capital Asset Purchases or Property Improvements	\$		<small>(note details)</small>			
Property Address																																																																				
Rental Income Received	period rented from	to \$																																																																		
Expenses																																																																				
Interest on Mortgage	\$																																																																			
<small>for money borrowed to purchase rental property, exclude principal payments, send statement to confirm amount paid during the year and balance at end of year) Given interest deductibility rules we need full details of when the interest was paid.</small>																																																																				
Bank Fees	\$																																																																			
Insurance	\$																																																																			
Legal Fees on Sale, Purchase or refinance	\$																																																																			
<small>(note details) include legal statements for our review</small>																																																																				
Low Value Asset Purchases (e.g. stove <\$500)	\$																																																																			
Real Estate Agent Management Fees	\$																																																																			
Rates (property and water)	\$																																																																			
<small>(note details)</small>																																																																				
Repairs & Maintenance	\$																																																																			
<small>(note details of any capital expenditure separately)</small>																																																																				
Tax Return Preparation Fee	\$																																																																			
Travel relating to Rental Property Inspections	\$																																																																			
<small>(note details)</small>																																																																				
Other Rental Property Expenses	\$																																																																			
<small>(note details)</small>																																																																				
Capital Asset Purchases or Property Improvements	\$																																																																			
<small>(note details)</small>																																																																				
Any self employment or other taxable income	<table border="1"> <thead> <tr> <th>Details</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>\$</td> </tr> </tbody> </table>	Details	Amount		\$																																																															
Details	Amount																																																																			
	\$																																																																			
Tax Deductible Expenses	<table border="1"> <thead> <tr> <th>Details</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>\$</td> </tr> </tbody> </table>	Details	Amount		\$																																																															
Details	Amount																																																																			
	\$																																																																			
Charitable donations paid for tax credit (attach receipts)	<table border="1"> <thead> <tr> <th>Details</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>\$</td> </tr> </tbody> </table>	Details	Amount		\$																																																															
Details	Amount																																																																			
	\$																																																																			

Please enter any other details or add further pages with full information

\$
\$
\$
\$
\$
\$
\$

Continue on separate sheets if needed

Add any relevant notes or questions here :