

# TERMS OF ENGAGEMENT AND DETAILS FOR RENTAL TAX RETURN

Fu	ıll Name:					
Ac	dress:					
IR	IRD Number:		Email:	Phone Numbers:		
Re	funds to be deposite	d to Bank Accoun	t Name: Bank Account Number:			
l re	quest Quantum to p	rocess and file m	y tax return for the year ended 31 March o	n the following	basis:-	
Plea I	ase add further deta I	ils if any of the fo	llowing apply:			
-	IRD Summary o Earnings	of Income should be shown from the following sources:				
	Details of any in or dividends inc		, 	educted	Gr oss Amou	unt
-	received during		غ		\$	
	above year		\$ \$		<u></u>	
		i	iX		. <u>.</u> ?	·
		Prop	erty Address			
			al Income Received period rented from to	·····	\$	
	Details of Rental Property Income	e (for mor stateme	INSES est on Mortgage hey borrowed to purchase rental property, exclude principal payments, send int to confirm amount paid during the year and balance at end of yearj Given intere ility rules we need fuil details of when the interest was paid.	\$ sst		
	Full Details provided separate sheet with		< Fees	\$		
	supporting information	tion if Insu	rance	\$		
	necessary. If Property is held jo	sintly with	l Fees on Sale, Purchase or refinance	Ś		
	any other person or	has been		Ś		
	used privately durin	ng the year	Value Asset Purchases (e.g. stove <\$500) Estate Agent Management Fees	\$ \$		
	please advise detail		s (property and water)			
		(note de		\$		
	Please also advise		airs & Maintenance	\$		
	property purchas	e 1:	tails of any capital expenditure separately). Return Preparation Fee	\$		
	And age in years of	÷	el relating to Rental Property Inspections	\$		
	building	(note de	tails)	Ş		
		Othe (note de	er Rental Property Expenses	\$		
		********	tal Asset Purchases or Property Improvements	\$ \$		
	Any self employ		Details			Amount
	other taxable in	come				\$
-	Tax Deductible Expenses		Details		I	Amount \$
-	Charitable do paid for tax cred receipts)	it (attach	Details		1	Amount \$

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



#### Terms of Engagement

- I appoint Quantum Accounting & Business Solutions Ltd ("you") as my agent for the purposes of completion of my Taxation Returns with the Inland Revenue Department. I 1. authorise you to obtain information from Inland Revenue and any other source about all tax types including through Inland Revenue media and communication channels and to make and receive payments and to sign any Inland Revenue forms on my behalf.
- 2. I will forward information for the preparation of my Financial Statements and Taxation Returns to you as set out above. This information is correct and complete and I do not wish you to conduct an audit or review of this information. I understand that you accept no liability for the accuracy of the information supplied and that Financial Statements and Tax Returns are prepared for my purposes only. I also acknowledge that in the preparation of Financial Statements and Taxation Returns, assumptions and determinations are made that may differ from any interpretations made by Inland Revenue and you will not be liable for claims or losses including any penalties imposed by the Inland Revenue Department. I will keep all tax records for a minimum of seven years
- In terms of the Privacy Act 1993 I authorise you to obtain any information that may be required by you in connection with any accounting services that I may engage you to 3. complete, including but not limited to preparation of my Financial Statements and Taxation Returns. The holder of any such information is authorised to release that information to you on sighting this form. You are authorised to supply information on my affairs to my bank, solicitor or any other party notified to you by us.
- I acknowledge your terms of trade for any work carried out on my behalf and that payment of accounts is due on the 20th of the month following invoice and that interest 4. of 2% per month plus collection charges may be added to outstanding accounts.

Signed: .....

Client Name:	
Rental Property Address	

\$

## Breakdown of Rental Income and Expenses during the Year Ended 31 March

Rental Income –	property	leased	from
-----------------	----------	--------	------

Dates from	to	Weekly Amount	\$	х	weeks = \$	weeks = \$	
Dates from	to	Weekly Amount	\$	х	weeks = \$		
Dates from	to	Weekly Amount	\$	х	weeks = \$		
Dates from	to	Weekly Amount	\$	х	weeks = \$		
Other or Irregu	lar amount	ts (do not count any B	ond pa	aid to Tenan	cy Services	\$	
	-						

Total Amount of Rent received during the above year

#### Expenses for Rental Property as summarised above

Expenses for Rental Property as summarised above				
Date	Amount	Details	Category Total	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$		\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	
	\$		\$	
	\$		\$	
Total Expenses	\$			

### **Total Expenses**

continue on separate sheet if needed, total each Expenses Category to agree with Summary above

Capital Items in Rental Property at commencement of Rental or Added during Year for Depreciation (examples shown) Date Purchased Cost or Value Item Description

Ş
>
ć
<u> </u>
Ş



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

Continue on separate sheets if needed

Add any relevant notes or questions here :