

# Personal Questionnaire

For the year ended 31<sup>st</sup> of March 2017

Full Name \_\_\_\_\_

## RECORDS SUPPLIED

PLEASE TICK

A) Other Business income – Please provide details of business income received from entities that this office does not prepare financial statements for. Include a copy of the Financial Statements where applicable.

Name \_\_\_\_\_ IRD Number \_\_\_\_\_

B) Overseas Income – attach statements

Yes  No

C) Rental Income

Yes  No

i. Provide details of Rent received

\$ \_\_\_\_\_

ii. List details of expenses incurred in earning rental income

Mortgage Interest \$ \_\_\_\_\_ Rates \$ \_\_\_\_\_

Repairs & Maintenance \$ \_\_\_\_\_ Insurance \$ \_\_\_\_\_

Body Corp Fees \$ \_\_\_\_\_ Property Management Fees \$ \_\_\_\_\_

iii. Address of Rental Property \_\_\_\_\_

iv. If any rental properties have been purchased or sold during the year, please provide the relevant settlement statements

Yes  No

D) Dividends/Interest – Please provide details of all investments and their relevant statements


\$ \_\_\_\_\_

F) Donations – Please provide receipts

Yes  No

Other Information \_\_\_\_\_

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