

**RENTAL PROPERTY INFORMATION  
FOR YEAR ENDED 31<sup>ST</sup> MARCH 2023**

Client Name:	Date:
Address:	Postal Address:
Telephone:	Mobile:
Fax:	Convenient time to call:
Email:	Marital Status: Has this changed?

*Please answer all questions. As the information you provide will be used for tax purposes, it is important that the information that you supply us is accurate and complete. If you have queries, please contact us.*

To: **Greenlane CA Limited**

I/We hereby instruct you to prepare my/our Financial Statements and Taxation Returns.

I/We undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. I/We understand that I am/we are responsible for the payment of all taxes. Your services are not intended to, and accordingly will not result in the expression by you of an opinion on the financial statements insofar as third parties are concerned, or the fulfilling of any statutory audit requirements. You are hereby authorised to communicate with the appropriate bankers, solicitors, finance companies, Inland Revenue Department, and other persons or organizations to obtain such further information as you may require in order to carry out the above assignments.

.....  
Client Signature

.....  
Date

**Instructions for completing the checklist**

- Use one sheet per property held during the year.
- Sale / Purchase of Property - only if it has occurred during this financial year.

**Steps**

1. Check name and fill in property address.
2. Mark in 'Claimed" column if you have the corresponding expense or not.
3. Mark in one of the three "Proved by" columns what you have sent to us to prove the expenses were incurred.
4. Fill in the "Amount" column.

**Extra Bits**

- If you have been late in filing your returns in the past you may no longer have an extension of time to the 31<sup>st</sup> March 2024. This means your returns must be filed into the IRD by the **7th July 2023**

**Check for the information provided**

- Have you given us all the invoices, bank statements and any other records to prove the amounts claimed?
- Have you included interest & dividend statements?
- Do you want us to do your Donations & Child care Rebate for you?

## RENTAL CHECKLIST FOR TAX YEAR FROM 1<sup>st</sup> April 2022 to 31<sup>st</sup> March 2023

Name						
Property Address/s						
	Claimed Yes/No	Proved By			Amount \$	Office Use Only
		Bank Statements	Invoices/ Receipts	Summaries/ Others		
Rent						
Rates						
House Insurance						
Mortgage Interest						
Mortgage Protection Ins						
Agent Fees						
Repairs & Maintenance						
Car Mileage or						
Travel & Accommodation						
Loan Process Fees						
Valuation Fees						
Advertising						
Tolls						
Accounting Fee						
Legal Fees						
Stationery/Postage						
Bank Fees						
Others (Detail):						
1						
2						
3						
Others:						
Assets used in the rental						

## SALE /PURCHASE OF RENTAL PROPERTIES

If you have purchased or sold rental properties during the year, please provide the following additional information:

**DATE/S OF SALE OR PURCHASE:**

Please provide following information for the properties:

- Sale & Purchase Agreement
- Solicitor’s Statement
- Legal Fees
- Valuation
- Bank Fees
- Real Estate Fees

<b>MORTGAGE &amp; LOAN BALANCE CONFIRMATION</b>			
Name of Bank/Account Number	Balance at 31/03/2023	Additional Loans	Loan Purpose