

# Rental Summary



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.

## Your Details

First Name(s)	<input type="text"/>											
Last Name	<input type="text"/>											
WooHoo ID or IRD Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Date of Birth	<input type="text" value="DD / MM / YYYY"/>

## The Property

This form is for a single property only. If you have other rental properties please fill out one form for each.

Address 1	<input type="text"/>										
Address 2	<input type="text"/>					Suburb	<input type="text"/>				
City	<input type="text"/>					Postcode	<input type="text"/>				
When was it available for renting?	<input type="text" value="DD / MM / YYYY"/>						<input type="text" value="DD / MM / YYYY"/>				
	<i>Start Date</i>						<i>End Date</i>				
Purchase/sale date (if applicable)	<input type="text" value="DD / MM / YYYY"/>						<input type="text" value="DD / MM / YYYY"/>				
	<i>Start Date</i>						<i>End Date</i>				

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

## Rental Income

When did the rental income begin?	<input type="text" value="DD / MM / YYYY"/>
Total rental income	<input type="text" value="\$"/>

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

Please provide one of the following:

- Bank statements highlighting the rental income
- Mortgage statement showing interest & principle for the financial year
- A spreadsheet detailing the rental income
- Statements from the property manager
- Name and contact details for the property manager (provide below)

Property manager (full name)	<input type="text"/>										
Email address	<input type="text"/>					Mobile	<input type="text"/>				

## General Expenses

Council rates	\$
Insurance	\$
MPI (mortgage protection insurance)	\$
Property Manager fees (if applicable)	\$
Previous Accountant's fees (if applicable, please attach a copy of the set of accounts)	\$
Phone/Internet	\$
Body Corporate fees (if applicable)	\$

## Vehicle Expenses

If you travel in your own vehicle to your rental property you may be able to claim some vehicle running costs as a work-related expense, for example, inspecting the property or doing some maintenance.

Distance between home and rental property (google maps can help with this)	<input type="text"/>	km
Number of trips to rental property	<input type="text"/>	

## Fixed Asset Expenses

List the fixed assets worth over \$500 that you've purchased to generate earnings from your rental property.

<input type="text"/>	Cost	\$	Purchase date	DD / MM / YYYY
<input type="text"/>	Cost	\$	Purchase date	DD / MM / YYYY
<input type="text"/>	Cost	\$	Purchase date	DD / MM / YYYY
<input type="text"/>	Cost	\$	Purchase date	DD / MM / YYYY
<input type="text"/>	Cost	\$	Purchase date	DD / MM / YYYY
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<input type="text"/>	Cost	\$	Purchase date	DD / MM / YYYY
<input type="text"/>	Cost	\$	Purchase date	DD / MM / YYYY

## Maintenance Expenses

List the repairs and/or maintenance you've had to undertake on your rental property.

<input type="text"/>	Cost	\$ <input type="text"/>	Purchase date	<input type="text" value="DD / MM / YYYY"/>
<input type="text"/>	Cost	\$ <input type="text"/>	Purchase date	<input type="text" value="DD / MM / YYYY"/>
<input type="text"/>	Cost	\$ <input type="text"/>	Purchase date	<input type="text" value="DD / MM / YYYY"/>
<input type="text"/>	Cost	\$ <input type="text"/>	Purchase date	<input type="text" value="DD / MM / YYYY"/>
<input type="text"/>	Cost	\$ <input type="text"/>	Purchase date	<input type="text" value="DD / MM / YYYY"/>
<input type="text"/>	Cost	\$ <input type="text"/>	Purchase date	<input type="text" value="DD / MM / YYYY"/>
<input type="text"/>	Cost	\$ <input type="text"/>	Purchase date	<input type="text" value="DD / MM / YYYY"/>

## Additional Comments

If there's anything else you'd like us to know about your rental income, filing your tax return, or have any questions you'd like us to answer, then please comment in this section and we'll be in touch if necessary.

## We're Here to Help

If you have any questions please contact us on **0800 03 04 05** or live chat to our support team directly at **woohoo.co.nz**.

## Contact Information

### Postal Address

NZ Tax Refunds Ltd, PO Box 28125,  
Christchurch 8242, New Zealand

### Phone

0800 03 04 05  
(+64 3 982 9504)

### Email

team@woohoo.co.nz

### Fax

(03) 982 9505