

## Mixed Use Asset Questionnaire

**ENTITY NAME:**   
**IRD NUMBER:**   
**CONTACT NAME:**   
**EMAIL:**   
**TAX YEAR:**



### Compliance

Please note: This document is an official accounting & taxation compliance requirement. This completed form is kept with your file in case of independent audit.

### Mixed Use Holiday Home owned by Entity

Does the entity have a property (such as a holiday home or bach) that is used privately and also to derive income?

If yes, please provide address of property and any other details you may feel relevant: Yes / No

Was the property empty for 62 days in the income year? Yes / No

*If yes, please complete the following section so we can determine the amount of allowable deductions.*

How many days was the property empty during the income year? \_\_\_\_\_

Number of days the property was used by family or associated persons during the income year? \_\_\_\_\_

Number of days the property was rented to the public. \_\_\_\_\_

The daily market rate rental for your holiday home? Peak Season \_\_\_\_\_ Off Peak Season \_\_\_\_\_

Dates \_\_\_\_\_ Dates \_\_\_\_\_

**Total rental income received for the income tax year.** \$ \_\_\_\_\_

### Expenses for the tax year

Advertising	\$ _____	Rates	\$ _____
Cleaning	\$ _____	Bank fees	\$ _____
House Insurance	\$ _____	Management fee	\$ _____
Interest on mortgage	\$ _____		
Repairs and maintenance	\$ _____	Other expenses	\$ _____
		(list on separate page if required)	

**Mixed Use Boat or Plane owned by Entity**

Does the entity have a boat or plane (with a market value of \$50,000 or greater) that is used privately and also derives income?

Yes / No

If yes, please provide description asset below:

Market Value: \$ \_\_\_\_\_

Was the asset unused for 62 days in the income year?

Yes / No

*If yes, please complete the following section so we can determine the amount of allowable deductions.*

**Mixed Use Boat or Plane – Information required**

How many days was the asset unused during the income year? \_\_\_\_\_ days

The number of days the asset was used by family or associated persons during the income year? \_\_\_\_\_ days  
*Associated persons include close relatives, or if own by an entity, persons associated with the entity owing the asset*

How many days was the asset used by non-associated persons where payment received was least 80% of market value \_\_\_\_\_ days

How much income did you receive from non-associated persons where payment received was at least 80% of market value  
Income Received: \$ \_\_\_\_\_

**Expenses incurred in respect of the asset:**

Cost of advertising for hireage \$ \_\_\_\_\_

Cost of repairing damages caused by hireage \$ \_\_\_\_\_

Operating costs / supplies \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Repairs / maintenance for general wear and tear \$ \_\_\_\_\_

Other (Please give details below) \$ \_\_\_\_\_