



PKF

PKF Francis Aickin Limited
Chartered accountants and business advisers

Passion

Teamwork

Clarity

Quality

Integrity

Mixed Use Holiday Home Questionnaire 2023

J

Client Name: _____

1. Does this entity have a property (such as a holiday home) that is used privately and to derive income?

| | | |
|-----|------------|---------------------------------|
| Yes | No/ N/A | Already provided/ in Xero |
|-----|------------|---------------------------------|

If yes, provide details of the property:

2. Was the property empty for 62 days in the income year?

| | | |
|-----|------------|---------------------------------|
| Yes | No/ N/A | Already provided/ in Xero |
|-----|------------|---------------------------------|

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

Mixed use holiday home – information required

3. The number of days the property was empty during the income year _____

4. The number of days the property was used by family or associated persons* during the income year _____
OR where income from any person received was less than 80% of market rate.

**Associated persons include close relatives or if owned by an entity, persons associated with the entity owning the property.*

5. If there is more than one tenant who used the property through the year, please attach details:

| | | |
|-----|------------|---------------------------------|
| Yes | No/ N/A | Already provided/ in Xero |
|-----|------------|---------------------------------|

Name of tenant: _____

Relationship to owner (if any): _____

Amount of rent they paid: \$ _____

Dates rented (From / To): _____

6. Expenses incurred in respect of the property. The list below is not exhaustive – details of all expenses will be required:
Expenses incurred in respect of the property. The list below is not exhaustive – details of all expenses will be required:

Cost of advertising for tenants: \$ _____

Cost of repairing damages caused by tenants: \$ _____

Number of days spent in the property while repairing damages caused by tenants: _____

Mortgage interest: \$ _____

Rates: \$ _____

Insurance: \$ _____

Repairs / maintenance for general wear and tear: \$ _____

Other (please give details): \$ _____

INFORMATION

If you have any other information, which you feel may be relevant to, or included in your tax return that has not been included in the above questions, please attach full details. i.e. any significant changes in your business, wealth or income.

Signature: _____

Date: _____