

Questionnaire Rental– 31 March 2026

Ensure this questionnaire is completed and included with your records

| | | | |
|--------------|---------------|--------|--|
| Client Name | | Phone: | |
| Balance Date | 31 March 2026 | Email: | |

| Name | IRD Number | Signature | Date |
|------|------------|-----------|------|
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Under the Companies Amendment Act 2014 there is now a requirement for all directors to provide their place of birth and date of birth AND in addition, there must be at least one director that either lives in New Zealand; or lives in Australia and is a director of a company incorporated in Australia:

| Director | Date of birth | City / Town of birth | Country of birth | Current residential address |
|----------|---------------|----------------------|------------------|-----------------------------|
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| Property Details | |
|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| Please provide us with the addresses of any rental properties you have. Address: _____ Address: _____ Address: _____ | If a property was not rented for a full 12 months, please provide details of why it was vacant. _____ _____ _____ |

Rental Income and Expenditure



Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties

OR

Please provide details of the following for each rental property. Use a separate sheet if necessary.



Income:

Total Rent Received \$ _____

Expenses:

Accounting fees \$ _____

Advertising (to rent) \$ _____

Bank fees \$ _____

Insurance \$ _____

Legal fees \$ _____

Management fees \$ _____

Mortgage Interest \$ _____
(attach copy of loan summary/statements from bank)

Phone \$ _____

Power \$ _____

Rates \$ _____

(including regional council rates)

Repairs and Maintenance \$ _____

(please attach details or invoices)

Valuation fees \$ _____

Water rates \$ _____

Details of any other expense relating to rental property:

_____ \$ _____

_____ \$ _____

Details of visits to inspect property/conduct property business:

Date Details

Kilometres

Rental Income from Overseas

Provide details of any income received from overseas, including rental income and any tax deducted from this income

Home Office Expenses

If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:

Address for Home Office _____

Home Office area: - no change as per previous year

OR

Area used for Business: _____ m²

Total Area of House & Workshop: _____ m²

Actual Cost Method

OR IRD Square Metre Rate Method (see below note)*

Power \$ _____

Insurance (Building & Contents) \$ _____

Interest (House Mortgage) \$ _____

Rates (including regional council rates) \$ _____

Rent \$ _____

Repairs & Maintenance \$ _____

Telephone rental \$ _____

Other \$ _____

Total \$ _____

Interest (House Mortgage) \$ _____

Rates (including regional council rates) \$ _____

Rent \$ _____

**Would you like to use the IRD rate? Visit the IRD website for the current rate. This allowance doesn't cover Mortgage Interest, Rates or Rent costs so we would still require these amounts.*

Covid-19 Wage Subsidy and other Covid-19 support payments

If you have received the Covid-19 Small Business Loan, have any interest payments and / or repayments been made?

Date rec: __/__/__ \$ _____

Date rec: __/__/__ \$ _____

Date rec: __/__/__ \$ _____

Date rec: __/__/__ \$ _____

| | |
|-----------------------------------------------------------------------------------------------------------------------------|--------------------------|
| Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required): | <input type="checkbox"/> |
| 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) : _____ | |

Mixed Use Boat or Plane

Does this entity have a boat or plane (with a market value of \$50,000 or greater), that is used privately and also to derive income? Yes No

If Yes, provide details:

Description: _____

Market value: \$ _____

Was the asset unused for 62 days or more 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

The number of days the asset was **unused** during the income year _____

The number of days the asset 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

For non-associated persons where payment received is at least 80% of market value:

Number of days the asset was used: _____

Income received: \$ _____

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

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) _____

| Other Details Required (if applicable) | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li data-bbox="172 219 560 246">• Solicitors Settlement Statement<li data-bbox="172 277 552 304">• Sale and Purchase Agreement<li data-bbox="172 336 600 362">• Loan details for property purchased<li data-bbox="172 394 639 421">• A copy of the latest Rateable Valuation<li data-bbox="172 452 1267 479">• Any notifications provided to IRD of residential property held on revenue account (taxable on sale)<li data-bbox="172 510 1147 537">• A list of chattels with their dates and value for properties bought or sold during the year | <input data-bbox="1437 226 1465 255" type="checkbox"/> <input data-bbox="1437 284 1465 313" type="checkbox"/> <input data-bbox="1437 342 1465 371" type="checkbox"/> <input data-bbox="1437 400 1465 430" type="checkbox"/> <input data-bbox="1437 459 1465 488" type="checkbox"/> <input data-bbox="1437 517 1465 546" type="checkbox"/> |

**Thank you for completing this questionnaire
Don't forget to sign it**