

Rental Questionnaire – 31 March 2026

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Email:	

Terms of Engagement

I/We hereby instruct you Urban2Rural Limited and staff/contractors as applicable to prepare our Taxation Returns for the 2026 year. 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.

Authority is given to obtain information from Inland Revenue, other government agencies and financial institutions about all tax types (except child support), bank and loan accounts in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels including electronic ones.

I/We authorise your organisation to act as our agent for ACC levy purposes for all associated entities. This authorisation allows your organisation to query and change information on my/our ACC levy account(s) through ACC staff, and through MyACC for Business. This authority will also allow your organisation's main representative discretion to delegate access to my/our ACC information to other members of your organisation. Other delegated members of your organisation will also be able to query and change information on my/our ACC levy account.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us however you are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

I/We also accept that you have the right to charge interest on overdue accounts at the rate of 2.0% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I/We accept that any collection costs you incur will be fully recoverable from me/us.

Name	IRD Number	Signature	Date

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

* Please advise if you have concerns on your address being visible on the Companies Register. Under new legislation that is about to become effective, an alternative address may be able to be provided if there is a risk of physical or mental harm if address details are publicly available

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	\$ _____	Phone \$ _____
Advertising (to rent)	\$ _____	Power \$ _____
Bank fees	\$ _____	Rates \$ _____
Insurance	\$ _____	(including regional council rates)
Legal fees	\$ _____	Repairs and Maintenance \$ _____
Management fees	\$ _____	(please attach details or invoices)
Mortgage Interest	\$ _____	Valuation fees \$ _____
(attach copy of loan summary/statements from bank)		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

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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?

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Date rec: __/__/__ \$ _____

Date rec: __/__/__ \$ _____

Date rec: __/__/__ \$ _____

Date rec: __/__/__ \$ _____

Have any amounts of Covid-19 support payments been repaid back?		☐
Please provide details of payment and reason for repayment Date paid back: ____/____/____ \$ _____ Reason: _____ 		
Residential Land Withholding Tax		
Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? If so, provide details e.g. IR1100 Residential land withholding tax return and other sale and purchase documents.	☐	
Residential Property Sales		
Have you sold any residential property during the year (not otherwise detailed on the information provided)? If yes, when was the property purchased? If it was sold before 1 July 2024, and purchased within 5 years of the sale date OR if it was sold on or after 1 July 2024 and purchased within 2 years of the sale date: • what was the original purchase price • and the sale price?	☐	\$
Mixed Use Holiday Home		
Does this entity have a property (such as a holiday home or a bach) that is used privately and also to derive income? Yes ☐ No ☐ If yes, provide details of property: _____ 		☐
Was the property empty 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.		
<u>Mixed Use Holiday Home – Information Required</u>		
The number of days the property was empty 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		
If there is more than one tenant who used the property through the year, please attach details.		
Name of tenant: _____ Relationship to owner (if any): _____ Amount of rent they paid: \$ _____ Dates rented (From: To) _____		☐
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	\$ _____	

