

# Rental Questionnaire –

Ensure this questionnaire is completed and included with your records

|              |  |        |  |
|--------------|--|--------|--|
| Client Name  |  | Phone: |  |
| Balance Date |  | Email: |  |

| Name | IRD Number | Signature | Date |
|------|------------|-----------|------|
|      |            |           |      |
|      |            |           |      |
|      |            |           |      |
|      |            |           |      |
|      |            |           |      |



## 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: \_\_\_\_\_ m<sup>2</sup>

Total Area of House & Workshop: \_\_\_\_\_ m<sup>2</sup>

Actual Cost Method

Power \$ \_\_\_\_\_

Insurance (Building & Contents) \$ \_\_\_\_\_

Interest (House Mortgage) \$ \_\_\_\_\_

Rates (including regional council rates) \$ \_\_\_\_\_

Rent \$ \_\_\_\_\_

Repairs & Maintenance \$ \_\_\_\_\_

Telephone rental \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

**Total** \$ \_\_\_\_\_

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

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: \_\_/\_\_/\_\_ \$ \_\_\_\_\_

**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 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?

---

\$

---

---

| <b>Mixed Use Holiday Home</b>  |   |
|--|---|
| <p>Does this entity have a property (such as a holiday home or a bach) that is used privately and also to derive income? <span style="float: right;">Yes <input type="checkbox"/> No <input type="checkbox"/></span></p> <p>If yes, provide details of property: _____</p> <hr/> <p>Was the property empty for 62 days or more in the income year? <span style="float: right;">Yes <input type="checkbox"/> No <input type="checkbox"/></span></p> <p>If yes, please complete the following section so we can determine the amount of allowable deductions.</p> <p><b><u>Mixed Use Holiday Home – Information Required</u></b></p> <p>The number of days the property was empty during the income year _____</p> <p>The number of days the asset was used by family or associated persons* during the income year<br/>OR where income from any person received was less than 80% of market rate _____</p> <p><small>* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property</small></p> <p>If there is more than one tenant who used the property through the year, please attach details.</p> <p>Name of tenant: _____</p> <p>Relationship to owner (if any): _____</p> <p>Amount of rent they paid: \$ _____</p> <p>Dates rented (From: To) _____</p> <p>Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):</p> <p>Cost of advertising for tenants \$ _____</p> <p>Cost of repairing damages caused by tenants \$ _____</p> <p>Number of days spent in the property while repairing damages caused by tenants _____</p> <p>Mortgage interest \$ _____</p> <p>Rates \$ _____</p> <p>Insurance \$ _____</p> <p>Repairs/maintenance for general wear and tear \$ _____</p> <p>Other (please give details) : _____</p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> |
| <b>Mixed Use Boat or Plane</b>   |   |
| <p>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? <span style="float: right;">Yes <input type="checkbox"/> No <input type="checkbox"/></span></p> <p>If Yes, provide details:</p> <p>Description: _____</p> <p>Market value: \$ _____</p> <p>Was the asset unused for 62 days or more in the income year? <span style="float: right;">Yes <input type="checkbox"/> No <input type="checkbox"/></span></p> <p>If yes, please complete the following section so we can determine the amount of allowable deductions.</p>  | <p><input type="checkbox"/></p>   |

|  |                          |
|--|--------------------------|
| <b>Mixed Use Boat or Plane – Information Required</b>  |                          |
| The number of days the asset was <b>unused</b> 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: _____   | <input type="checkbox"/> |
| Income received: \$ _____  |                          |
| 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 hireage \$ _____   |                          |
| Cost of repairing damages caused by hireage \$ _____   |                          |
| Operating costs / supplies \$ _____  |                          |
| Insurance \$ _____   |                          |
| Repairs/maintenance for general wear and tear \$ _____   |                          |
| Other (please give details) _____  |                          |
| <b>Other Details Required (if applicable)</b>  |                          |
| • Solicitors Settlement Statement  | <input type="checkbox"/> |
| • Sale and Purchase Agreement  | <input type="checkbox"/> |
| • Loan details for property purchased  | <input type="checkbox"/> |
| • A copy of the latest Rateable Valuation  | <input type="checkbox"/> |
| • Any notifications provided to IRD of residential property held on revenue account (taxable on sale)                          | <input type="checkbox"/> |
| • A list of chattels with their dates and value for properties bought or sold during the year                                  | <input type="checkbox"/> |

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