

2026 Rental Questionnaire

Ensure this questionnaire is completed and included with your records

Client Name		Phone	
Balance Date		Email	

To: Abacus Chartered Accountants Ltd

Terms of Engagement

We hereby instruct Abacus Chartered Accountants Ltd and staff/contractors as applicable to prepare our Taxation Returns for the 2026 year. I 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.

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 1.5% per month, and that all accounts are due for payment within 14 days 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.

Signature _____ Date _____

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: <table> <tr> <td>Accounting fees</td> <td>\$ _____</td> <td>Phone</td> <td>\$ _____</td> </tr> <tr> <td>Advertising (to rent)</td> <td>\$ _____</td> <td>Power</td> <td>\$ _____</td> </tr> <tr> <td>Bank fees</td> <td>\$ _____</td> <td>Rates</td> <td>\$ _____</td> </tr> <tr> <td>Insurance</td> <td>\$ _____</td> <td>(including regional council rates)</td> <td></td> </tr> <tr> <td>Legal fees</td> <td>\$ _____</td> <td>Repairs and Maintenance</td> <td>\$ _____</td> </tr> <tr> <td>Management fees</td> <td>\$ _____</td> <td>(attach details or invoices)</td> <td></td> </tr> <tr> <td>Mortgage Interest</td> <td>\$ _____</td> <td>Valuation fees</td> <td>\$ _____</td> </tr> <tr> <td>(attach copy of loan summary/statements from bank)</td> <td></td> <td>Water rates</td> <td>\$ _____</td> </tr> </table>	Accounting fees	\$ _____	Phone	\$ _____	Advertising (to rent)	\$ _____	Power	\$ _____	Bank fees	\$ _____	Rates	\$ _____	Insurance	\$ _____	(including regional council rates)		Legal fees	\$ _____	Repairs and Maintenance	\$ _____	Management fees	\$ _____	(attach details or invoices)		Mortgage Interest	\$ _____	Valuation fees	\$ _____	(attach copy of loan summary/statements from bank)		Water rates	\$ _____	
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Details of any other expense relating to rental property: _____ \$ _____ _____ \$ _____																																	
Details of visits to inspect property/conduct property business: Date Details Kilometres _____ _____																																	

Home Office Expenses (if applicable)

If part of your home is set aside principally for use as an office/workshop/storage area which is used by you in relation to your rental property, you may be able to claim a proportion of your home expenses against your rental income. Please provide the following details:

Home Office area:

Area used for Business: _____ m²

No change as per previous year ☐

Total Area of House & Workshop: _____ m²

Actual Cost Method

Power \$ _____
 Insurance (Building & Contents) \$ _____
 Interest (House Mortgage) \$ _____
 Rates \$ _____
 Repairs and maintenance \$ _____
 Other \$ _____
Total \$ _____

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

Interest (House Mortgage) \$ _____

Rates \$ _____

Rent \$ _____

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

Other Details Required (if applicable)

- Solicitors Settlement Statement
- Sale and Purchase Agreement
- Loan details for property purchased
- A copy of the latest Rateable Valuation
- A list of chattels with their dates and value for properties bought or sold during the year

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Mixed Use Holiday Home (if applicable)

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

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Details of property:

Was the property empty for 62 days in the income year? If yes, please complete the following section so we can determine the amount of allowable deductions.

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Mixed Use Holiday Home – Information Required

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

The number of days the property was used by family or associated persons* during the income year _____

* 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) _____

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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)

☐

Thank you for completing this questionnaire - don't forget to sign it.