

## Rental Questionnaire – 1 April 2025 to 31 March 2026

Ensure this questionnaire is completed and included with your records

Client Name:		Phone:	
Balance Date:		Email:	

To: Toni Walker Limited

### **Terms of Engagement**

I hereby instruct you Toni Walker Limited and staff 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 as my tax agent. All income tax returns will be signed by me however you are authorised to sign any other taxation return on behalf of myself or any of my associated entities.

Signature:	Date:
------------	-------



<b>Loan Statements</b>	
Supply a copy of any loan transaction statements for the financial year up to your balance date.	<input type="checkbox"/>
<b>Home Office Expenses</b> (if applicable)	
<p>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 <b>may</b> be able to claim a proportion of your home expenses against your rental income. Please provide the following details:</p> <p>Area used for Business: _____ m<sup>2</sup>          Total Area of House &amp; Workshop: _____ m<sup>2</sup>          Power \$ _____          Insurance (Building &amp; Contents) \$ _____          Interest (House Mortgage) \$ _____          Rates (including regional council rates) \$ _____          Repairs and maintenance \$ _____          Other \$ _____  <b>Total</b> \$ _____</p>	<input type="checkbox"/>
<b>Other Details Required</b> (if applicable)	
<ul style="list-style-type: none"> <li>• Solicitors Settlement Statement</li> <li>• Sale and Purchase Agreement</li> <li>• Loan details for property purchased</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>

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