Rental Questionnaire – 2026

Ensure this questionnaire is completed and included with your records.

Name	
Phone Number	
Email Address	

To: DRK Chartered Accountants Ltd

Terms of Engagement

I/We hereby instruct you DRK Chartered Accountants Ltd 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.

I/We authorise your organisation to use Microsoft Copilot and other DRK-approved artificial intelligence and productivity tools to assist with administrative, research, analysis, drafting and reporting tasks connected with our engagement. Any such use remains subject to our confidentiality, privacy, information-security and quality-control obligations. AI-assisted work is reviewed by appropriately qualified personnel, professional judgement is not delegated to the technology, and DRK remains responsible for the services and deliverables it provides to you.

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 up to 1.5% 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.

______________________________ ______________________________

Clients 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:

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
______	____	_________________
______	____	_________________
______	____	_________________

Home Office Expenses (if applicable)

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

Address for Home Office

____

Home Office area: - no change to area used per previous year ☐

<u>If area changed from previous year</u>

Area used for Business: _________ m²

Total Area of House & Workshop: _________ m²

<u>Actual Cost Method</u>		<u>OR IRD Square Metre Rate Method</u> (see below note)*	
Power	$____________		
Insurance (Building & Contents)	$____________		
Interest (House Mortgage)	$____________	Interest (House Mortgage)	$____________
Rates (including regional council rates)	$____________	Rates (including regional council rates)	$____________
Rent	$____________	Rent	$____________
Repairs & Maintenance	$____________		
Telephone rental	$____________		
Other	$____________		
Total	**$____________**		

**Would you like to use the IRD rate? Currently it is $42.75 per square metre. This allowance doesn't cover Mortgage Interest, Rates or Rent costs so we would still require these amounts.*

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 purchased with 10 years of the sale date,

- what was the original purchase price $______________________
- and the sale price? ______________________

Mortgage Interest Paid on Residential Properties

Have you incurred interest on residential properties owned (which is not your main family home)? Is the interest also against properties other than residential rentals? If so, please provide details of amount of interest and dates paid. ☐

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 in the income year? Yes ☐ No ☐

If yes, please complete the following section so we can determine the amount of allowable deductions.

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 rented in total during the income year _________

The number of days the property was available to be rented 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 $_________________

Insurance $_________________

Repairs/maintenance for general wear and tear $_________________

Other (please give details) : ____

Other Details Required (if applicable)	

• Solicitors Settlement Statement
• Sale and Purchase Agreement
• Loan details for property purchased
• A copy of the latest Rateable Valuation
• Any notifications provided to IRD of residential property held on revenue account (taxable on sale)
• A list of chattels with their dates and value for properties bought or sold during the year
• For Trusts:
  ○ Any gifting to a Trust carried out this financial year?
  ○ Any change in Trustees?
	☐
	☐
	☐
	☐
	☐
	☐
	☐
	☐