

Rental Questionnaire – 2026

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Email:	

To: Oldershaw & Co Limited

Authority to Act – INLAND REVENUE, ACC & THIRD-PARTY

I authorise Oldershaw & Co Limited, staff, and contractors (if applicable) to:

1. Inland Revenue

- A. Receive all Inland Revenue correspondence for the tax types for which tax returns are prepared by Oldershaw & Co Limited, using their postal or email address.
- B. Obtain information through all Inland Revenue media and communication channels including phone or fax or online, to request to receive, correspondence related to all tax types and all future tax types (except child support), to modify tax details, to prepare, submit and sign tax returns on my behalf.
- C. IRD refunds may, if required, be received on my behalf in to Oldershaw & Co Limited Trust Account. After reconciliation, including the deduction of any outstanding debts, the Trust will distribute any remaining refund to the individuals or entities listed below.

2. Third Party Suppliers - Access and utilise selected services and products from third parties that facilitate their ability to provide their services e.g. cloud-based software like Xero, their email and collaboration platforms like Microsoft and batch mail house services.

3. Third Party Contacts – obtain information from people and organisations as required e.g. banking and financial institutions, solicitors, insurance companies.

4. ACC - Query and change information on my ACC levy account(s) via ACC staff, and through MyACC Business.

I understand and accept that:

- 1. This written authority consents to Oldershaw & Co Limited adding myself or the entity, I represent listed below to their Tax Agency Client List which entitles this Tax Agency to have full access to all information held by Inland Revenue.
- 2. It permits Oldershaw & Co Limited to transfer any tax credits held on behalf of the customer between the customers tax type accounts.
- 3. My personal information will not be used by any third-party providers for any other purpose than to facilitate the work/services they provide to us.
- 4. Where AML documentation is requested and I have not been able to provide verified copies of my identity prior to engagement, I give permission for our details to be verified independently.
- 5. This authority is valid indefinitely until it is cancelled by Oldershaw & Co Limited or by myself, as requested by either party at their discretion.

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
(Client Name 1)				
(Client Name 2)				
(Client Name 3)				
(Client Name 4)				
(Client Name 5)				

* Please advise if you have concerns on our 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.	<input type="checkbox"/> <input type="checkbox"/>
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

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

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: __/__/__ \$ _____

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 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	
<p>Does this entity have a property (such as a holiday home or a bach) that is used privately and also to derive income? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, provide details of property: _____</p> <hr/> <p>Was the property empty for 62 days or more in the income year? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, please complete the following section so we can determine the amount of allowable deductions.</p> <p><u>Mixed Use Holiday Home – Information Required</u></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 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>
Mixed Use Boat or Plane	
<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? Yes <input type="checkbox"/> No <input type="checkbox"/></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? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, please complete the following section so we can determine the amount of allowable deductions.</p>	<p><input type="checkbox"/></p>

<p>Mixed Use Boat or Plane – Information Required</p> <p>The number of days the asset was unused during the income year _____</p> <p>The number of days the asset was used by family or associated persons* during the income year _____</p> <p>OR where income from any person received was less than 80% of market rate _____</p> <p>* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property</p> <p>For non-associated persons where payment received is at least 80% of market value:</p> <p>Number of days the asset was used: _____</p> <p>Income received: \$ _____</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 hireage \$ _____</p> <p>Cost of repairing damages caused by hireage \$ _____</p> <p>Operating costs / supplies \$ _____</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>Other Details Required (if applicable)</p>	<p><input type="checkbox"/></p>
<ul style="list-style-type: none"> • 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 	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>

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