

Rental Questionnaire – 2022

Ensure this questionnaire is completed and included with your records

Client Name	
Balance 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.		<input type="checkbox"/>
Income: Total Rent Received \$ _____		<input type="checkbox"/>
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 _____ _____ _____		

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.	<input type="checkbox"/>

Residential Property Sales	
Have you sold any residential property during the year (not otherwise detailed on the information provided)?	<input type="checkbox"/>
If yes, when was the property purchased?	
If it was purchased within 5 years of the sale date,	\$
<ul style="list-style-type: none"> • 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 to derive income? <div style="text-align: right;">Yes <input type="checkbox"/> No <input type="checkbox"/></div> <input style="float: right; margin-right: 10px;" type="checkbox"/></p> <p>If yes, provide details of property: _____ _____</p> <p>Was the property empty for 62 days in the income year? Yes <input type="checkbox"/> No <input type="checkbox"/> 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>* Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property</p> <p>If there is more than one tenant who used the property through the year, please attach details.</p> <p>Name of tenant: _____ <input style="float: right; margin-right: 10px;" type="checkbox"/></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): <input style="float: right; margin-right: 10px;" type="checkbox"/></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>Electricity \$ _____</p> <p>Kilometres travelled to inspect property Total No. _____</p> <p>Other (please give details) : _____</p>	
<p><u>Other Details Required (if applicable)</u></p> <ul style="list-style-type: none"> • Solicitors Settlement Statement <input style="float: right; margin-right: 10px;" type="checkbox"/> • Sale and Purchase Agreement <input style="float: right; margin-right: 10px;" type="checkbox"/> • Loan details for property purchased <input style="float: right; margin-right: 10px;" type="checkbox"/> • A copy of the latest Rateable Valuation <input style="float: right; margin-right: 10px;" type="checkbox"/> • A list of chattels with their dates and value for properties bought or sold during the year <input style="float: right; margin-right: 10px;" type="checkbox"/> 	

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

Client Name:

Signature: