



TAX EXPERTS LIMITED
CHARTERED ACCOUNTANTS

RENTAL INCOME QUESTIONNAIRE FOR THE YEAR ENDED 31ST MARCH 2024

NAME (PERSONAL/COMPANY)	
IRD NUMBER	
HOME PHONE NUMBER	
EMAIL ADDRESS	
MOBILE NUMBER	
POSTAL ADDRESS	
PHYSICAL ADDRESS	
RENTAL PROPERTY ADDRESS	

SIGNATURE	
NAME	
DATE	

Information for Preparing your Annual Accounts

01st April 2023 to 31st March 2024

These questionnaires are extremely important. Our compilation of your accounts and tax returns is only based on the information that you provide and hence please provide as much details as you can.

	PARTICULAR	AMOUNT
1.	RENTAL INCOME	
	Total Rental Income earned (Gross)	\$
	Number of months property available for rent during the year	\$
2.	EXPENSES	
	Advertising Expenses	\$
	Accountancy Fees	\$
	Bank Charges	\$
	Body Corporate Expenses	\$
	Commission / Property Management Fees	\$
	Cleaning Expenses / Pest Control	\$
	Gardening Expenses	\$
	Home office Use (Refer below)	\$
	Insurance – Contents (for Rental Property only)	\$
	Insurance – House (for Rental Property only)	\$
	Mortgage repayment Insurance (for mortgage on Rental)	\$
	Interest Cost (exclude principal content of loan repayment)	\$
	Leasehold Costs	\$
	Legal Expenses – attach details	\$
	Power (for Rental Property only)	\$
	Rates (including Water Rates if applicable)	\$
	Repairs & Maintenance (please provide Invoices)	\$
	Telephone / Cell phone (please provide details)	\$
	Travelling Expenses (please provide details of mileage)	\$
	Valuation Fees Paid	\$
	Other Expenses (please provide details)	\$

3.	Market Value of Properties	
	Rental Property Address:	
	Present Market Value	\$
4.	Loan Balances	
	Name Of Bank:	
	Bank Balance as at 31 March 2024 (Please provide copies PDF and CSV copies of Bank Statements)	\$
	Loan Balances as at 31 March 2024 (Please provide copies PDF and CSV copies of Loan Statements)	\$
	Any Cash Incentive Received	
	Loan Establishment/Early Repayment/Break Fees Paid	
5.	GST	
	Are you registered for GST? If so, provide details (Note: Supply of residential accommodation is exempt from GST)	YES/NO
6.	Property Details	
	If this is the first year you have owned or rented out the property, please also provide:	YES/NO
	• Cost of Property	\$
	• Latest Government Valuation	\$
	◆ Land & Building	\$
	◆ Chattels (Give the break-up of the chattels in the property separately)	
	◆ Date of Valuation	
	• Please provide copies of Sale and Purchase Agreement	YES/NO
	• Copy of solicitors' settlement statement with purchase details	YES/NO
	Is the Property new build – If YES, please provide CCC Please select the appropriate Not a Residential land Company or a Maori exempt Company Property not in NZ or schedule 15 exclusion New Build exemption Development exemption Loan drawn down prior to 27 th March 2021 Approved Build to Rent Exclusion Kianga Ora Agreement	YES/NO
7.	Any Sale of Investment Property/Rental activity ceased If yes, please provide details	YES/NO

8.	Fixed Assets/Improvements (Furniture & Fittings, Chattels) <ul style="list-style-type: none"> • Provide details along with copies of Invoices. • Provide details of Chattels sold/written off. • Any Insurance payments/Court settlements. 																												
9.	Company Tax Status																												
	<p>If the company is an LTC, please provide details of any debt security in place including the name of the party or parties securing the debt, what debt has been secured and the type of security in place.</p> <p>We need this information to determine the extent of the LTC losses claimable under the new LTC rules.</p>																												
10.	Home Office Claim <p>If you use an office at home to run your property portfolio business (more than 1 property), we can claim a percentage of home costs. This percentage is dependent on the size of your office in relation to your home. Please complete the following:</p> <table border="1"> <tr> <td>Total Area of Property</td> <td>Sq mt</td> <td></td> </tr> <tr> <td>Office Area</td> <td>Sq mt</td> <td></td> </tr> <tr> <td>Business Percentage</td> <td>%</td> <td></td> </tr> <tr> <td>Insurance (Building & Content)</td> <td>\$</td> <td></td> </tr> <tr> <td>Interest (House Mortgage)/Rent Paid</td> <td>\$</td> <td></td> </tr> <tr> <td>Rates (Water and Council)</td> <td>\$</td> <td></td> </tr> <tr> <td>Repairs & Maintenance (Office Area Only)</td> <td>\$</td> <td></td> </tr> <tr> <td>Electricity/Gas/ Light/Heating</td> <td>\$</td> <td></td> </tr> <tr> <td>Total</td> <td>\$</td> <td></td> </tr> </table>		Total Area of Property	Sq mt		Office Area	Sq mt		Business Percentage	%		Insurance (Building & Content)	\$		Interest (House Mortgage)/Rent Paid	\$		Rates (Water and Council)	\$		Repairs & Maintenance (Office Area Only)	\$		Electricity/Gas/ Light/Heating	\$		Total	\$	
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Total	\$																												
11.	Company Information																												
	DIVIDEND DISTRIBUTIONS Please provide details of dividends paid for the year	\$																											
	CAPITAL COMMITMENTS Please provide details of any capital commitments	\$																											
	CHANGES IN COMPANY DETAILS Please provide information regarding any changes to the company (e.g. Director/shareholder changes, address changes)																												
	PLEASE CONTACT US IMMEDIATELY IF A SHAREHOLDER/DIRECTOR IS MOVING OVERSEAS																												