

## Rental Questionnaire – 31 March 2025

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 March 2025	Email:	

To: Shore Chartered Accountants Limited

### **Terms of Engagement**

I/We hereby instruct you and staff/contractors as applicable to prepare our Taxation Returns for the 2025 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.

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 1.5% per month, and that all accounts are due for payment by the 20<sup>th</sup> 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.

Name	IRD Number	Signature	Date

<b>When do you want your accounts completed by?</b>	
Has the nature of your business changed in any way during the past 12 months? If yes, please provide brief details: _____ _____ _____ _____	

<b>Property Details</b>	
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. _____ _____

<b>Rental Income and Expenditure</b>		✓																																
Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties <b>OR</b> Please provide details of the following for each rental property. Use a separate sheet if necessary.		<input type="checkbox"/>																																
<b>Income:</b> Total Rent Received                      \$ _____		<input type="checkbox"/>																																
<b>Expenses:</b> <table style="width: 100%; border: none;"> <tr> <td style="width: 33%;">Accounting fees</td> <td style="width: 33%;">\$ _____</td> <td style="width: 33%;">Phone</td> <td style="width: 33%;">\$ _____</td> </tr> <tr> <td>Advertising (to rent)</td> <td>\$ _____</td> <td>Power</td> <td>\$ _____</td> </tr> <tr> <td>Bank fees</td> <td>\$ _____</td> <td>Rates</td> <td>\$ _____</td> </tr> <tr> <td>Insurance</td> <td>\$ _____</td> <td colspan="2">(including regional council rates)</td> </tr> <tr> <td>Legal fees</td> <td>\$ _____</td> <td>Repairs and Maintenance</td> <td>\$ _____</td> </tr> <tr> <td>Management fees</td> <td>\$ _____</td> <td colspan="2">(please attach details or invoices)</td> </tr> <tr> <td>Mortgage Interest</td> <td>\$ _____</td> <td>Valuation fees</td> <td>\$ _____</td> </tr> <tr> <td>(attach copy of loan summary/statements from bank)</td> <td></td> <td>Water rates</td> <td>\$ _____</td> </tr> </table>		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	\$ _____	
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Details of any other expense relating to rental property: _____ \$ _____ _____ \$ _____																																		
Details of visits to inspect property/conduct property business: <table style="width: 100%; border: none;"> <thead> <tr> <th style="width: 10%;">Date</th> <th style="width: 50%;">Details</th> <th style="width: 40%;">Kilometres</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> </tr> </tbody> </table>		Date	Details	Kilometres	_____	_____	_____	_____	_____	_____	_____	_____	_____																					
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<b>Rental Income from Overseas</b>	
Provide details of any income received from overseas, including rental income and any tax deducted from this income	<input type="checkbox"/>

## 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: \_\_\_\_\_ m<sup>2</sup>

Total Area of House & Workshop: \_\_\_\_\_ m<sup>2</sup>

Actual Cost Method

OR IRD Square Metre Rate Method (see below note)\*

Power \$ \_\_\_\_\_

Insurance (Building & Contents) \$ \_\_\_\_\_

Interest (House Mortgage) \$ \_\_\_\_\_

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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? 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: \_\_\_\_\_

Amount: \$ \_\_\_\_\_

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.



<b>Other Details Required (if applicable)</b>	
<ul style="list-style-type: none"> <li>• Solicitors Settlement Statement</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Sale and Purchase Agreement</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Loan details for property purchased</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• A copy of the latest Rateable Valuation</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Any notifications provided to IRD of residential property held on revenue account (taxable on sale)</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• A list of chattels with their dates and value for properties bought or sold during the year</li> </ul>	<input type="checkbox"/>

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