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 guery 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 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.

| Name | IRD Number | Signature | Date |
|------|------------|-----------|------|
| | | | |
| | | | |

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

| Property Details | | | | |
|---|------------------------------|--|--|---|
| Please provide us with the addresses of any rental properties you have. | | If a property was not rented for a | | |
| Address: | | months, please provide details o was vacant. | f why it | |
| Address: | | | | |
| Address: | | | | |
| | | | | |
| Rental Income and E | xpenditure | | | ✓ |
| Please supply bank statement OR Please provide details of the f | | - | s that relate to the rental properties e sheet if necessary. | |
| Income: Total Rent Received | \$ | | | |
| Expenses: | Φ | Phone | ¢. | |
| Accounting fees Advertising (to rent) | \$ ¢ | Pnone Power | Ф | |
| Bank fees | \$ \$ | Rates | \$ ¢ | |
| Insurance | \$ \$ | (including regional | council rates) | |
| Legal fees | \$ | Repairs and Mainte | • | |
| Management fees | \$ | (please attach deta | | |
| Mortgage Interest | \$ | Valuation fees | \$ | |
| (attach copy of loan summary | /statements from bank) | Water rates | \$ | |
| Details of any other expense i | relating to rental property: | | | |
| | | \$ | | |
| | | \$ | | |
| Details of visits to inspect prop Date Details | perty/conduct property bus | siness: | Kilometres | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Rental Income from 0 | Overseas | | | |
| Provide details of any income and any tax deducted from this | | ncluding rental income | | |

Client Questionnaire Rental 2025

| 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 p | previous year | | | |
| OR | | | | |
| Area used for Business: | m² | | | |
| Total Area of House & Workshop: | m² | | | |
| Actual Cost Method | OR IRD Squar | re Metre Rate Method (see below note)* | | |
| Power | \$ | | | |
| Insurance (Building & Contents) | \$ | | | |
| Interest (House Mortgage) | \$ Interest (House | e Mortgage) \$ | | |
| Rates (including regional council rates) | \$ Rates (including | ng regional council rates) \$ | | |
| Rent | \$ Rent | \$ | | |
| Repairs & Maintenance | \$ | | | |
| Telephone rental | \$ | | | |
| Other | \$ | | | |
| Total | \$ | | | |
| *Would you like to use the IRD rate? V. Rates or Rent costs so we would still re | | is allowance doesn't cover Mortgage Interest, | | |
| Covid-19 Wage Subsidy and other | er Covid-19 support payments | | | |
| If you have received the Covid-19 Sr made? | mall Business Loan, have any interest pa | ayments and / or repayments been | | |
| Date rec://_ \$ | _ | | | |
| Date rec://_ \$ | _ | | | |
| Date rec://_ \$ | _ | | | |
| Date rec://_ \$ | _ | | | |
| | | | | |
| Have any amounts of Covid-19 supp | oort payments been repaid back? | | | |
| Please provide details of payment and | reason for repayment | | | |
| Date paid back: | | | | |
| | | Reason: | | |
| Amount: \$ | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Residential Land Withholdi | | | | |
| | lew Zealand where Residential Land nd paid to the IRD? If so, provide details ng tax return and other sale and purchase | | | |

| Residential Property Sale | S | | | |
|---|--|--------|-------------------------------|--|
| Have you sold any residential prope the information provided)? | rty during the year (not otherwise detailed on | | | |
| 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 or | Residential Properties | | | |
| main family home or 'new build')? Is | ntial properties owned (which is not your the interest also against properties other e provide details of amount of interest and | | | |
| | dence that receives a Code Compliance was added to the land on or after 27 March | | | |
| Mixed Use Holiday Home | | ı | | |
| Does this entity have a property (sucincome? | ch as a holiday home or a bach) that is used pr | rivate | ly and also to derive | |
| If yes, provide details of property: | | | Yes | |
| Was the property empty for 62 days If yes, please complete the following | or more in the income year? section so we can determine the amount of al | llowal | Yes ☐ No ☐ ble deductions. | |
| Mixed Use Holiday Home - Info | ormation Required | | | |
| The number of days the property wa | s empty 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 at | tach d | details. | |
| Name of tenant: | | | | |
| Relationship to owner (if any): | | | | |
| Amount of rent they paid: Dates rented (From: To) | \$ | | | |
| Expenses incurred in respect of the required): | property (the list below is not exhaustive – det | ails o | f all expenses will be | |
| 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 report wear and toor | | | \$ | |
| Repairs/maintenance for general wear and tear Other (places give details): | | | \$ | |
| 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 | |

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