

**RENTAL INFORMATION ON QUESTIONNAIRE  
FOR THE YEAR ENDED \_\_\_\_\_**

**NAME or ENTITY:** \_\_\_\_\_

| Please confirm your contact details (if changed) |  |                             |       |
|--|--|-----------------------------|-------|
| Postal address                                   |  | Telephone                   |       |
|  |  | Mobile                      |       |
| Contact Person                                   |  | E-mail address              |       |
| IRD number                                       |  | Preferred method of contact | Post  |
|  |  |                             | Email |

It is a requirement for us to retain a questionnaire on file for each income year. We thank you for taking the time to complete this questionnaire for each trading entity that requires financial statements and / or an income tax return to be prepared.

If you have any queries about how to complete this questionnaire please contact us on (07) 378 7150 or (06) 388 0860

**FOR RESIDENTIAL RENTAL:**

| Property Address 1 | Property Address 2 | Property Address 3 |
|--------------------|--------------------|--------------------|
| _____              | _____              | _____              |
| _____              | _____              | _____              |
| _____              | _____              | _____              |

|                 |       |                 |       |                 |       |
|-----------------|-------|-----------------|-------|-----------------|-------|
| Rent Received   | _____ | Rent Received   | _____ | Rent Received   | _____ |
| Advertising     | _____ | Advertising     | _____ | Advertising     | _____ |
| Accountancy fee | _____ | Accountancy fee | _____ | Accountancy fee | _____ |
| Bank Charges    | _____ | Bank Charges    | _____ | Bank Charges    | _____ |
| Insurance       | _____ | Insurance       | _____ | Insurance       | _____ |
| Interest        | _____ | Interest        | _____ | Interest        | _____ |
| Management fee  | _____ | Management fee  | _____ | Management fee  | _____ |
| Rates           | _____ | Rates           | _____ | Rates           | _____ |
| Repairs & Main  | _____ | Repairs & Main  | _____ | Repairs & Main  | _____ |
| Other           | _____ | Other           | _____ | Other           | _____ |

**FOR SHORTSTAY AND AIR BNB PLEASE ALSO PROVIDE FOR EACH PROPERTY ABOVE THE FOLLOWING:**

Total nights rented \_\_\_\_\_

Total nights available for rent \_\_\_\_\_

**FOR PROPERTIES PURCHASED OR NEWLY RENTED IN THIS TAX YEAR:**

- (a) Please enclose a copy of the sale and purchase agreement for any rental property / properties purchased during the year. YES / NO / NA
- (b) Please supply a list of all chattels for each property purchased during the year, listing their market value at time of purchase (see attached forms). YES / NO / NA
- (c) Please enclose real estate summaries if using a rental agent. YES / NO / NA

**FOR MIXED USE ASSETS:**

Is the property a mixed use assets such as a holiday home

- 1) Used for income earning use and
- 2) Used for provide use and
- 3) Is unoccupied for 62 days or more of the year

(a) In addition to the above, please provide details of how the asset is used for each day of the year, including days on which the asset was used privately by yourself or family, days it was rented to non-associated people, days it was vacant, and days it was unavailable due to carrying out repairs and / or maintenance.

Please record separately:

- Days carrying out repairs for damage caused by non-associated people renting the property at market value \_\_\_\_\_
- Days carrying out repairs for damage caused by private use, and \_\_\_\_\_
- Days carrying out repairs for general wear and tear. \_\_\_\_\_

(b) Details of who used the home each days it was in use including the

- Number of nights they used the property
- Person's relationship to you (i.e. son, friend, unrelated)
- Rent charged to each person

(c) Details repair costs split between costs for damage caused by non-associated people renting the property for market value, repairs required from private use, and general wear and tear.

| Details                                   | ✓ | Days | Amount |
|---|---|------|--------|
| Rented to third parties at market value   |   |      |        |
| Booked by third parties but not used      |   |      |        |
| Rented to family at any price             |   |      |        |
| Used by owner / family / friends for free |   |      |        |
| Days unused                               |   |      |        |

NOTES: \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_