



2024 RENTAL PROPERTY QUESTIONNAIRE

Do not use this one for a Business - there is a different questionnaire

NAME:

Circle Answer

- 1 BANK STATEMENTS – Rental Bank Accounts ONLY** (*don't need personal accounts*) Yes No N/A
Please provide the bank statements for all bank accounts used for the rental(s) for the FULL year from 1 April 2023 to 31 March 2024

AND write a description on each line of the bank statements – include which address

- 2 RENT STATEMENTS FROM MANAGEMENT COMPANY** Yes No N/A
Please provide the detailed statements from 1 April 2023 to 31 March 2024

- AND / OR CODING REPORT FROM MYOB ESSENTIALS** Yes No N/A
If you normally receive a coding report this will be sent out to you shortly.
However, if you don't receive one then please phone or email us to request it

- 3 RENT INCOME BANKED INTO OTHER ACCOUNTS** Yes No N/A
Attach details – bank statements highlighted or list with date, who from, amount etc.

- 4 EXPENSES PAID PRIVATELY OR WITH CREDIT CARD** Yes No N/A
Did you pay for any rental expenses with personal funds?
Please provide a list showing date, who to, what for and amount etc.

- 5 OUTSTANDING RENT OR OTHER DEBTORS** Yes No N/A
List any rent arrears at 31 March 2024

Name & Rental Address	\$

- 6 LOOK THROUGH COMPANY (LTC)** Yes No N/A
Are your rentals owned in an LTC Company???

Valuation Required - Every rental property should have a current valuation report
The cheapest option is probably via www.gv.co.nz – enter the property address & search.
Then choose the E-valuer report for around \$50. EVERY property needs one at least every 2nd year
Please send the valuations (however obtained) to us each year. **NB: A rates valuation is NOT sufficient!**

- 7 REPAIRS AND MAINTENANCE** Yes No N/A
Attach copies of invoices for all repairs and maintenance **over \$1,000**

- 8 LEGAL EXPENSES & SETTLEMENT STATEMENTS** Yes No N/A
Attach copies of invoices for all legal fees in the last financial year.
We also need copies of ALL settlement statements for any properties bought or sold

9 PROPERTIES – PURCHASED OR SOLD

Have there been any properties bought or sold during the financial year? Please provide **ALL** Settlement Statements and Sale & Purchase Agreements. Yes No N/A

Property Address	Sale or Purchase?	Date	\$	Settlement Stmts Attached
				Tick <input type="checkbox"/>
				Tick <input type="checkbox"/>
				Tick <input type="checkbox"/>
				Tick <input type="checkbox"/>
				Tick <input type="checkbox"/>

10 OTHER ASSETS – PURCHASED OR SOLD – MORE THAN \$1,000

Yes No N/A

If there have been any assets sold or purchased during the financial year, please provide details and invoices.

Assets are those items with a life of more than 1 year that cost more than \$1,000

Assets Sold or Scrapped

Description	Date	\$

Assets Purchased

Description	Date	\$	Invoice Attached
			Tick <input type="checkbox"/>
			Tick <input type="checkbox"/>
			Tick <input type="checkbox"/>

11 DO YOU HAVE A BOAT, BACH or HOLIDAY RENTAL?

Yes No N/A

If you rent it out to the public AND you use it yourself then we need the details as shown below.

If you are not sure if it applies to you – please ask

If so, we need the following information:

No. of Days Rent Paid

\$

Number of days rented or leased to independent 3rd parties

Number of days used by you or your family

\$ _____

PLEASE PROVIDE A DETAILED LIST OF DATES, NAMES, AMOUNTS ETC

12 CREDITORS / ACCOUNTS PAYABLE / ARREARS

Yes No N/A

List of all accounts owing at year end (Amounts owing by you for the rental property) E.g. Rates, Body corp etc

These are invoices received dated March or before, but not paid until April or later

Name	What for	Amount

13 LOAN STATEMENTS – DETAILING INTEREST & PRINCIPAL PAID FOR LOANS

Provide copies of Loan statements showing interest and principal paid for the year. Yes No N/A

As interest on Residential Rental properties is no longer fully deductible, we MUST have the loan statements showing the Interest paid for Each MONTH so we ensure we claim the most you are allowed – unsure how to obtain this ask your bank or talk to us

14 NEW MORTGAGE / LOAN DETAILS

Attach a copy of any other NEW Mortgage / Loan / HP agreements

Yes No N/A

15 RENTAL PROPERTIES

Please complete the following details for all rental properties that you own.
A new line will be required if the tenant changed during the year.

Property Address	Tenant Name	Date Tenancy Began	Date Tenancy Ended	Weekly Rental	Did weekly rental change during the year	
					Date Rent Change	New Weekly Rent

16 PROPERTY NOT AVAILABLE FOR RENT

Yes No N/A

Was there a period the property was not available for rent during the year? E.g. the property was being renovated, used by family etc

Property Address	For what reason was it Unavailable	Date became not available	Date became available to rent again	Date began advertising for new tenants

17 TRAVEL

Yes No N/A

Travel to inspect the property is generally deductible. **Either:**

Indicate the actual costs (*receipts needed*) \$ _____ Number Km's
OR The number of kilometres travelled _____

Remember - you must be able to justify this mileage with a logbook or similar (don't guess!)

Vehicle Make and Model _____

Fuel Type – e.g. Petrol, Diesel, Hybrid, Electric _____

18 HOME OFFICE – Do you have an area set aside as an office in your home?

Yes No N/A

NB: IF THE RENTAL IS MANAGED NO HOME OFFICE CAN BE CLAIMED

Body Corp fees	\$ _____	Electricity/Gas	\$ _____
Gardening	\$ _____	Repairs – rest of house	\$ _____
Insurance – contents	\$ _____	Repairs – office area only	\$ _____
Insurance – house	\$ _____	Rates – Council & Regional	\$ _____
Phone - Business tolls & cell phone only	\$ _____	Water rates	\$ _____
Interest on Mortgage	\$ _____	Broadband/Internet	\$ _____
Rent	\$ _____	Telephone – rental only	\$ _____
Other specify.....	\$ _____	Other specify.....	\$ _____

Total area of house _____ Total area of office _____

Did you move during the year? Yes / No Date of Move _____

If you did move, please provide month by month breakdown for all the expenses that apply above

19 INTEREST RECEIVED – Bank, PIE & KiwiSaver

Yes No N/A

Attach Interest certificates & RWT Certificates – while we get some details from IRD we need to check

20 DIVIDENDS RECEIVED Yes No N/A
Attach Dividend certificates or obtain report from Link or Computershare

21 BANK ACCOUNT NUMBER - Please enter the account number for any tax refund for the business

22 CORRESPONDENCE & NEWSLETTERS Via Email or NZ Post

23 UPDATE CONTACT DETAILS - PLEASE complete email / phone even if you think there are no changes

Postal Address: **Work Phone:**

..... **Home Phone:**

..... **Fax Number:**

Physical Address: **Cellphone:**

..... **Email:**

.....

24 OTHER INFORMATION AND INTENTIONS Yes No N/A
What plans do you have that might be relevant to your tax situation? E.g. sale/purchase rental or business, moving into import/export, expected large increase/decrease in sales etc. Details below:

25 I CERTIFY THAT the information provided in this document is true, and correct to the best of my knowledge; and that I have provided all the relevant documentation and data needed:

Signature _____ Date _____

Name in Full _____
