

Rental Questionnaire – 2025

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date	31 st March 2025	Email:	

To: Lynda Stevenson Chartered Accountants Ltd

Terms of Engagement

I/We hereby instruct you Lynda Stevenson Chartered Accountants Ltd 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 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.

- *The authority to act must be signed by all appropriate signatories i.e. all partners in a partnership, trustees in a trust and directors in a company (except where recorded that one director has specific signing authority, or one person has recorded delegated authority from the other owners/members to sign on their behalf). Trustees who are acting as a Trustee in their professional capacity are not required to sign an authority to act, unless all trustees in the Trust are professional trustees, in which case at least one Trustee should sign. See **IRD Information Authority** for full details of this requirement.*

Name	IRD Number	Signature	Date

Under the Companies Amendment Act 2014 there is now a requirement for all directors to provide their place of birth and date of birth AND in addition, there must be at least one director that either lives in New Zealand; or lives in Australia and is a director of a company incorporated in Australia:

Director	Date of birth	City / Town of birth	Country of birth	Current residential address

Property Details		
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. _____ _____
Rental Income and Expenditure		✓
Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties OR Please provide details of the following for each rental property. Use a separate sheet if necessary.		<input type="checkbox"/> <input type="checkbox"/>
Income: Total Rent Received \$ _____		
Expenses:		
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 \$ _____	
Details of any other expense relating to rental property: _____ \$ _____ _____ \$ _____		
Details of visits to inspect property/conduct property business: Date Details Kilometres _____ _____ _____		

Rental Income from Overseas

Provide details of any income received from overseas, including rental income and any tax deducted from this income

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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: _____ m²

Total Area of House & Workshop: _____ m²

Actual Cost Method

Power \$ _____

Insurance (Building & Contents) \$ _____

Interest (House Mortgage) \$ _____

Rates (including regional council rates) \$ _____

Rent \$ _____

Repairs & Maintenance \$ _____

Telephone rental \$ _____

Other \$ _____

Total \$ _____

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

Interest (House Mortgage) \$ _____

Rates (including regional council rates) \$ _____

Rent \$ _____

**Would you like to use the IRD rate? Currently it is \$53.10 per square metre. This allowance doesn't cover Mortgage Interest, Rates or Rent costs so we would still require these amounts.*

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.

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Residential Property Sales

Have you sold any residential property during the year (not otherwise detailed on the information provided)?

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If yes, when was the property purchased?

If it was purchased within 2 years of the sale date,

- what was the original purchase price
- and the sale price?

\$ _____

Mortgage Interest Paid on Residential Properties		
<p>Have you incurred interest on residential properties owned (which is not your main family home or 'new build')? Is the interest also against properties other than residential rentals? If so, please provide details of amount of interest and dates paid.</p> <p>* A new build is a self-contained residence that receives a Code Compliance Certificate confirming the residence was added to the land on or after 27 March 2020</p>	<input type="checkbox"/>	

Mixed Use Holiday Home	
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Does this entity have a property (such as a holiday home or a bach) that is used privately and also to derive income?

Yes ☐ No ☐

If yes, provide details of property: _____

If yes, provide details of property:_____

Was the property empty for 62 days or more in the income year? Yes ☐ No ☐

If yes, please complete the following section so we can determine the amount of allowable deductions.

Mixed Use Holiday Home – Information Required

The number of days the property was 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 attach details.

Name of tenant:

Relationship to owner (if any): _____

Relationship to owner (if any): _____

Amount of rent they paid: \$ _____

Amount of rent they paid: \$ _____

Dates rented (From: To) _____

Expenses incurred in respect of the property (the list below is not exhaustive – details of all expenses will be required):

Cost of advertising for tenants	\$	
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Cost of repairing damages caused by tenants	\$	
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Number of days spent in the property while repairing damages caused by tenants	
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Mortgage interest	\$	
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Rates	\$
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Insurance	\$	
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Repairs/maintenance for general wear and tear	\$	
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Other (please give details) :

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

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