



**TAX EXPERTS LIMITED**  
**CHARTERED ACCOUNTANTS**

**RENTAL INCOME QUESTIONNAIRE FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2026**

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<b>NAME (PERSONAL/COMPANY)</b>	
<b>IRD NUMBER</b>	
<b>HOME PHONE NUMBER</b>	
<b>EMAIL ADDRESS</b>	
<b>MOBILE NUMBER</b>	
<b>POSTAL ADDRESS</b>	
<b>PHYSICAL ADDRESS</b>	
<b>RENTAL PROPERTY ADDRESS</b>	

<b>SIGNATURE</b>	
<b>NAME</b>	
<b>DATE</b>	

## Information for Preparing your Annual Accounts 01<sup>st</sup> April 2025 to 31<sup>st</sup> March 2026

These questionnaires are extremely important. Our compilation of your accounts and tax returns is only based on the information that you provide and hence please provide as much details as you can.

	PARTICULAR	AMOUNT
1.	<b>RENTAL INCOME</b>	
	Total Rental Income earned (Gross)	
	Number of months property available for rent during the year	
2.	<b>EXPENSES</b>	
	Advertising Expenses	
	Accountancy Fees	
	Bank Charges	
	Body Corporate Expenses	
	Commission / Property Management Fees	
	Cleaning Expenses / Pest Control	
	Gardening Expenses	
	Home office Use (Refer below)	
	Insurance – Contents (for Rental Property only)	
	Insurance – House (for Rental Property only)	
	Mortgage repayment Insurance (for mortgage on Rental)	
	Interest Cost (exclude principal content of loan repayment)	
	Leasehold Costs	
	Legal Expenses – attach details	
	Power (for Rental Property only)	
	Rates (including Water Rates if applicable)	
	Repairs & Maintenance (please provide Invoices)	
	Telephone / Cell phone (please provide details)	
	Travelling Expenses (please provide details of mileage)	
	Valuation Fees Paid	
	Other Expenses (please provide details)	

<b>3. Market Value of Properties</b>	
Rental Property Address:	
Present Market Value	
<b>4. Loan Balances</b>	
Name Of Bank:	
Bank Balance as at 31 March 2026 (Please provide copies PDF and CSV copies of Bank Statements)	
Loan Balances as at 31 March 2026 (Please provide copies PDF and CSV copies of Loan Statements)	
<b>Any Cash Incentive Received</b>	
<b>Loan Establishment/Early Repayment/Break Fees Paid</b>	
<b>5. GST</b>	
Are you registered for GST? If so, provide details <b>(Note: Supply of residential accommodation is exempt from GST)</b>	
<b>6. Property Details</b>	
If this is the first year you have owned or rented out the property, please also provide:	
<ul style="list-style-type: none"> <li>• Cost of Property</li> </ul>	
<ul style="list-style-type: none"> <li>• Latest Government Valuation</li> </ul>	
<ul style="list-style-type: none"> <li>◆ Land &amp; Building</li> </ul>	
<ul style="list-style-type: none"> <li>◆ Chattels (Give the break-up of the chattels in the property separately)</li> </ul>	
<ul style="list-style-type: none"> <li>◆ Date of Valuation</li> </ul>	
<ul style="list-style-type: none"> <li>• Please provide copies of Sale and Purchase Agreement</li> </ul>	
<ul style="list-style-type: none"> <li>• Copy of solicitors' settlement statement with purchase details</li> </ul>	
<b>7. Any Sale of Investment Property/Rental activity ceased If yes, please provide details</b>	
<b>8. Fixed Assets/Improvements (Furniture &amp; Fittings, Chattels)</b>	
<ul style="list-style-type: none"> <li>• Provide details along with copies of Invoices.</li> <li>• Provide details of Chattels sold/written off.</li> <li>• Any Insurance payments/Court settlements.</li> </ul>	
<b>9. Company Tax Status</b>	
If the company is an LTC, please provide details of any debt security in place including the name of the party or parties securing the debt, what debt has been secured and the type of security in place.	

**10 Home Office Claim**

If you use an office at home to run your property portfolio business (more than 1 property), we can claim a percentage of home costs. This percentage is dependent on the size of your office in relation to your home. Please complete the following:

<b>Total Area of Property</b>	Sq mt	
<b>Office Area</b>	Sq mt	
<b>Business Percentage</b>	%	
<b>Insurance (Building &amp; Content)</b>		
<b>Interest (House Mortgage)/Rent Paid</b>		
<b>Rates (Water and Council)</b>		
<b>Repairs &amp; Maintenance (Office Area Only)</b>		
<b>Electricity/Gas/ Light/Heating</b>		
<b>Total</b>		

**11 Company Information****DIVIDEND DISTRIBUTIONS**

Please provide details of dividends paid for the year

**CAPITAL COMMITMENTS**

Please provide details of any capital commitments

**CHANGES IN COMPANY DETAILS**

Please provide information regarding any changes to the company (e.g. Director/shareholder changes, address changes)

**PLEASE CONTACT US IMMEDIATELY IF A SHAREHOLDER/DIRECTOR IS MOVING OVERSEAS**