



**BUSINESS
ALLSORTS**
Sweet Ideas | SMART Solutions

Rental Property Check List

Name & IRD:

Email Address:

Change of details:

Complete this section if you have a new address or phone number

Information required

How do you want to supply your information?

Online software ☐ Saved Data file ☐ Spreadsheet ☐ Bank statements ☐ Other ☐ _____

Did you receive any of the following?

Income Source:	Please provide	Tick
Rental income	Please complete the rental property checklist VY'ck	<input type="checkbox"/>
Interest from banks etc	Withholding Tax statement sent to you by your bank – please scan and d f c j JXY	<input type="checkbox"/>
Power Dividend	If power paid for tenant. Dividend statements / advices – please scan and d f c j JXY	<input type="checkbox"/>

Rental Property Checklist

Property Ownership Details

Please provide details of the legal ownership of your rental property

**Address of
Rental Property:**

	Tick	Names that house title is registered under
As individual or Partners	<input type="checkbox"/>	<input type="text"/>
A Company (Non LTC)	<input type="checkbox"/>	<input type="text"/>
A Look through Company	<input type="checkbox"/>	<input type="text"/>
A Trust	<input type="checkbox"/>	<input type="text"/>

Was property rented for full 12 months? ☐ Yes ☐ No if no, how many weeks was it rented?

Reason property vacant:

eg. Couldn't find tenants / Renovation
Holiday home

.....
.....
.....
.....

Is this a holiday home you use personally? ☐ Yes ☐ No
If yes, how many days was the property unavailable (not advertised) / not used by anyone for?

Is this the first year you have owned this rental property? ☐ Yes ☐ No

If yes, please provide copies or details of:

Tick

Sales and purchase agreement ☐

Solicitors (Lawyers) settlement statement ☐

Rental Income and Expenses

* We only need the information below if it is not already entered in the system/spreadsheet provided by you.

	Tick	Amount
Rent Received	<input type="checkbox"/>	<input type="text"/>
Accounting Fees	<input type="checkbox"/>	<input type="text"/>
Advertising (For tenants etc)	<input type="checkbox"/>	<input type="text"/>
Agents Fees & Commissions	<input type="checkbox"/>	<input type="text"/>
Bank & Loan Fees	<input type="checkbox"/>	<input type="text"/>
Insurance (Property and Landlord insurance)	<input type="checkbox"/>	<input type="text"/>
Interest paid on mortgage: 1 April 2024 to 31 March 2025 (only 80% Claimable if not a new build)	<input type="checkbox"/>	<input type="text"/>
Legal Fees (Excluding fees related to purchase of property)	<input type="checkbox"/>	<input type="text"/>
Rates – Water and Council	<input type="checkbox"/>	<input type="text"/>
Repairs and maintenance	<input type="checkbox"/>	<input type="text"/>
Garden Maintenance	<input type="checkbox"/>	<input type="text"/>
Travel (Please provide approx. km travelled in relation to rental property)	<input type="checkbox"/>	<input type="text" value="km"/>
Other: Please Specify	<input type="checkbox"/>	<input type="text"/>
Other: Please Specify	<input type="checkbox"/>	<input type="text"/>
Other: Please Specify	<input type="checkbox"/>	<input type="text"/>
	<input type="checkbox"/>	<input type="text"/>

☐ Yes ☐ No

Chattels/Assets purchased eg. Heat pump, new carpet, smoke detectors, Alarm, furniture and fittings?

<i>Date</i>	<i>Asset Purchased</i>	<i>Amount paid</i>	<i>New or 2nd Hand?</i>

Chattels/Assets sold or disposed of

<i>Date</i>	<i>Asset sold/disposed</i>	<i>Amount received (if any)</i>	<i>if disposed (reason)</i>

Additional Notes

[illegible]