



**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 dfcj JXY	<input type="checkbox"/>
Power Dividend	If power paid for tenant. Dividend statements / advices - please scan and dfcj 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"/>	_____
A Company (Non LTC)	<input type="checkbox"/>	_____
A Look through Company	<input type="checkbox"/>	_____
A Trust	<input type="checkbox"/>	_____

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"/>	km <input type="text"/>
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"/>

Have you purchased any chattels/assets for the property since buying it?  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 2<sup>nd</sup> Hand?</i>

### **Chattels/Assets sold or disposed of**

## Additional Notes