

Rental Questionnaire – 31 March 2026

Please ensure this questionnaire is completed and included with your records

Client Name		Phone	
		Mobile	
Balance Date		Email	
		IRD number	

To: Bella Consultants Limited

Terms of Engagement

I hereby instruct you to prepare our Taxation Returns for the year/period ending 31 March 2026. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require for completion of the above assignment.

You are to represent me as my tax agent. Authority is given to obtain information from the Inland Revenue about all tax types (except NCP or CPR) until further notice. This includes obtaining information through all Inland Revenue media and communication channels.

I also accept that Bella Consultants Limited has 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 the discretion of Bella Consultants Limited. I accept that any collection costs incurred by Bella Consultants Limited will be fully recoverable from me.

Privacy Act 1993

1.1 The Landlord and the guarantor/s (if separate to landlord) authorise Bella Consultants Limited to:

- a) collect, retain and use any information about myself and/or guarantors, for the purpose of assessing the landlord and/or guarantors creditworthiness; and
- b) disclose information about the landlord and/or guarantors, whether collected by Bella Consultants Limited from myself and/or guarantors directly or obtained by Bella Consultants Limited from any other source, to any other credit provided or any credit reporting agency for the purposes of providing or obtaining a credit reference, debt collection or notifying a default by the landlord and/or guarantors.

1.2 Where the landlord and/or the guarantors are an individual the authorities under clause 17.1 are authorities or consents for the purposes of the Privacy Act 1993.

1.3 The landlord and/or the guarantors shall have the right to request Bella Consultants Limited for a copy of the information about myself and/or guarantors retained by Bella Consultants Limited and the right to request Bella Consultants Limited to correct any incorrect information about the landlord and/or guarantors held by Bella Consultants Limited.

Personal Guarantee

Where the name of a guarantor is completed at the foot of this agreement, then that person personally guarantees full payment of any amounts due to us in terms of this agreement.

Signature _____

Date _____

Name / Guarantor _____

Property Details

Please provide us with the addresses of any rental properties you have.

1. Address: _____

2. Address: _____

3. Address: _____

4. Address: _____

If a property was not rented for a full 12 months, please provide details of why and when it was vacant.

Rental Income and Expenditure - Not owned in a Company

Please supply bank statements clearly identifying and detailing all transactions that relate to the rental properties for the entire year 1 April 2025 to 31 March 2026.

If you use Xero or MYOB please provide and include one month past balance date:

- Bank statements including any savings account or term deposit.
- Suppliers' invoices.

☐
☐

These statements should include:-

- Land and water rates
- Insurance
- Repairs and maintenance
 - All expenses
 - Invoices
- All legal documents pertaining to the rental properties
 - Sales and purchase agreements for a property bought or sold during this year
 - Lawyers invoices and settlement statements
- Copy of invoices for all asset purchases

☐
☐
☐
☐
☐
☐
☐

Mixed Use Asset

Is your property rented for:-

☐ Long Term ☐ Short Term (see below)

Short Term Rental

Was the property used privately by yourselves, family or friends? ☐ Yes (see below) ☐ No

If Yes how many days? _____

Was the property vacant for 62 or more days? ☐ Yes ☐ No

How many days was the property rented to a third party? _____

For non-GST registered, is your preference?

- ☐ Return flat-rate credit as income
(can increase taxable income) ☐ Exclude flat-rate credit
(we will require additional information)

Home Office Expenses **Not required if using Property Manager*

If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:

- Average hours spent working from home per week on all business related matters _____

• Rent \$ _____

• Power \$ _____

• Insurance (Building & Contents) \$ _____

• Interest (House Mortgage) \$ _____

• Rates \$ _____

• Repairs & Maintenance \$ _____

• Other (e.g. home phone rental) \$ _____

Records Required:**Comment:****Rental Company Management Statements**

- Annual statement (if used).
- All monthly statements if no annual one issued.
- Copy of maintenance invoices paid by property manager.

**Legal and Loan Documents**

Supply a copy of any loan transaction statements for the financial year up to your balance date.



Please attach any solicitor's statements and Sale and Purchase Agreements relating to any legal transactions during the year. Please also include Statements and Agreements relating to any mortgages, hire purchase, leases or loans. Please include a copy of your latest Rateable Valuation for any properties you own.

**Interest and Dividend Certificates**

Whilst the IRD hold a certain amount of dividend information, we cannot confirm that this information is complete or accurate.

**Transactions Not Through the Rental Account**

Were all expenses paid from your rental bank account? Yes ☐ No ☐

If No, list expenses paid and dates given



Personal \$ _____

Business \$ _____

Others \$ _____

[illegible]

Account name:

- - -
 Bank Branch Account Suffix

Don't forget to sign it