

## ECOVIS KGA LIMITED

### 2026 Rental Income Questionnaire

This questionnaire forms part of the Business, Individual and Trust Questionnaire.  
 Please ensure this questionnaire is completed and included with your records that are sent to us.

***Please complete a separate questionnaire for each rental property, or provide us with a spreadsheet in electronic format with the information below.***

Client Name	
IRD Number	

<b>Address of Property</b>

<b>Property Details</b>		
If this is the first year that you have owned the property, also provide: <ul style="list-style-type: none"> <li>• Solicitors Settlement Statement</li> <li>• Sale and Purchase Agreement</li> <li>• Loan details for property purchased</li> <li>• A copy of the latest Rateable Valuation</li> <li>• A list of Chattels and their value for properties bought or sold during the year</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

<b>Short Term Accommodation (Including holiday homes)</b>		
Was any rent received from short term stays, such as Air BnB, Bookabach etc	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Are you or the entity renting the property registered for GST	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Are you or the entity renting the property subject to Platform Economy Requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Have you ever claimed an GST input tax credit in relation to the purchase of the property or acquired the property as a GST zero-rated purchase.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If you answered Yes to any of the above please provide details below:		
_____		
_____		

<b>Rental Income</b>		
Total rental income received	\$	_____
Rent received in advance	\$	_____
Rent arrears (amount owed to you at balance date)	\$	_____
Was the property available for rent for the entire year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If not, please provide an explanation:		
_____		
Was the property rented for a full 12 months?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If not, please provide details of why it was vacant:		
_____		



**Mixed Use Holiday**

Does the business own a property (such as a holiday home or a bach) that is used privately and also to derive income?  Yes  
 No

Details of property:

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Was the property empty for 62 days or more in the income year?  Yes  
 If yes, please complete the following section so we can determine the amount of allowable deductions.  No

The number of days the property was empty during the income year \_\_\_\_\_

The number of days the property 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

Please provide the following information for each tenant that used the property during the year:

Name of tenant: \_\_\_\_\_  
 Relationship to owner (if any): \_\_\_\_\_  
 Amount of rent they paid: \_\_\_\_\_  
 Dates rented (From:To): \_\_\_\_\_

If there is more than one tenant who used the property through the year, please attach details.

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

**Mixed Use Boat or Plane**

Does the business own a boat or plane (with a cost or market value of \$50,000 or greater), that is used privately and also to derive income?  Yes  No

If yes, please provide details:

Description: \_\_\_\_\_

Market Value: \_\_\_\_\_

Was the asset unused 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.

The number of days the asset was unused 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 asset

For non-associated persons where payment received is at least 80% of market value:

Number of days the asset was used: \_\_\_\_\_

Income received: \_\_\_\_\_

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

Cost of advertising and hireage \$ \_\_\_\_\_

Cost of repairing damages caused by hireage \$ \_\_\_\_\_

Operating costs / supplies \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Repairs/maintenance for general wear and tear \$ \_\_\_\_\_

Other (please give details) \$ \_\_\_\_\_

**Thank you for completing this questionnaire!**