

2025 Property Investment Questionnaire

for the income tax year starting 1 April 2024 to 31 March 2025

Please ensure you sign and return this questionnaire with all relevant information. Please mark the ENCLOSED box to confirm information is enclosed. If question is not applicable please mark the N/A box.

Note: Incomplete information will result in a delay in starting your accounts and may increase costs to you.

Name:

A PROPERTY CHANGES (NZ & OVERSEAS)

ENCLOSED N/A

1. PURCHASE OF INVESTMENT PROPERTY

Please provide details of property purchases

(Including sale and purchase agreements, settlement statements and valuation)

☐ ☐

\$

Property Address:

Chattel Valuation

☐ ☐

1a. WAS THE PROPERTY A NEW BUILD? I.E. CCC ISSUED AFTER 27 MARCH 2020?

☐ ☐

2. SALE OF INVESTMENT PROPERTY

Please provide details of property sales

(Including sale and purchase agreements, settlement statements and valuation)

☐ ☐

\$

Property Address:

3. HAVE YOU SOLD A PROPERTY PURCHASED ON OR AFTER 29 MARCH 2018?

Please provide details of property sales

(Including sale and purchase agreements, settlement statements and valuation)

☐ ☐

\$

4. RENTAL ACTIVITY CEASED (E.G. MOVED INTO PROPERTY)

Please provide details and date rental activity ceased

☐ ☐

Property Address:

B ASSETS

ENCLOSED N/A

5. RENTAL BANK ACCOUNTS/CREDIT CARDS

Please provide year end statements and closing balances

☐ ☐

\$

6. FIXED ASSETS/IMPROVEMENTS (FURNITURE & FITTINGS, CHATTELS)

Please provide details of purchases

(Invoices for items over \$1000, sale & purchase agreements, settlement statements & an appropriate business use %)

☐ ☐

\$

Please provide details of Capital Improvements

(Note that improvements to the property will be included as an asset and will not be tax deductible)

☐ ☐

\$

Please provide details of any assets sold or written off

(This should include market values for any assets taken for private use)

☐ ☐

\$

Please provide details of any insurance payouts/court settlements

(e.g. Leaky Building)

☐ ☐

\$

2025 Property Investment Questionnaire

C LIABILITIES ENCLOSED N/A

7. LOANS & MORTGAGES

Please provide loan statements/summaries

(Ensure this includes the closing balance for the year and details of any foreign loans)

☐ ☐

\$

Please provide details of New or Refinanced Loans and any Cash Incentives/Rewards received (Including term of loan, private use, properties used for security etc.)

☐ ☐

\$

Loan Establishment/Early Repayment/Break Fees Paid

☐ ☐

\$

Please provide NRWT/AIL Returns and Workings

(Non Resident Withholding Tax (NRWT)/Approved Issuer Levies (AIL) are payable on some foreign loans)

☐ ☐

\$

8. *** FOR LOOK THROUGH COMPANY CLIENTS ONLY ***

Please provide Loan Agreements; Letter of Offer or Bank Contact Details below if unsure

☐ ☐

Bank:

Contact:

Ph/Email:

D RENTAL ACTIVITY ENCLOSED N/A

9. PLEASE SELECT THE RENTAL INFORMATION PROVIDED

Property Manager Statements/Summaries for the year

☐ ☐

Bank Statements with clear descriptions for all transactions

☐ ☐

Computerised Accounting System (Please complete Computerised System Checklist)

☐ ☐

Alternatively provide Summary (As per below)

☐ ☐

PROPERTY NAME

Air BnB (please tick)

☐
☐
☐

Months Available for Rent

No. Private Days (Holiday Home)

INCOME

Rent Received

\$

\$

\$

Water Reimbursements

\$

\$

\$

EXPENSES

Advertising

\$

\$

\$

Body Corporate

\$

\$

\$

General/Other (Full details)

\$

\$

\$

Insurance

\$

\$

\$

Interest

\$

\$

\$

Property Management Fee

\$

\$

\$

Rates (Including water)

\$

\$

\$

Repairs & Maintenance (Full details/invoices)

\$

\$

\$

Valuation Fees

\$

\$

\$

Improvements & new assets

\$

\$

\$

TOTAL

\$

\$

\$

PROPERTY INSPECTION COSTS

Mileage Kilometers (km)

km

km

km

2025 Property Investment Questionnaire

E GOODS & SERVICES TAX (GST) (COMMERCIAL RENTALS ONLY)

ENCLOSED N/A

10. PLEASE PROVIDE COPIES OF GST RETURNS AND WORKINGS

☐ ☐

F OTHER EXPENSES

ENCLOSED N/A

11. OVERHEAD EXPENSES

Accounting

\$

☐ ☐

Bank Charges

\$

☐ ☐

Other (Full details)

\$

☐ ☐

12. HOME OFFICE EXPENSES (YEARLY) (ONLY FOR TWO OR MORE PROPERTIES)

☐ ☐

Electricity/Gas

\$

Insurance (Dwelling & contents)

\$

Rent or Interest on Mortgage

\$

Rates (Including water rates)

\$

Repairs & Maintenance (Office area only)

\$

Office Floor Spac

m²/ft²

Total House Floor Space

m²/ft²

Home Telephone Line Rental

\$

☐ ☐

Home Telephone Business Calls

\$

☐ ☐

Mobile Phone Business Calls

\$

☐ ☐

Internet Costs

\$

☐ ☐

Would you like to use IRD's "Square metre rate option"?

☐ Y ☐ N

G OTHER INFORMATION

ENCLOSED N/A

13. MARKET VALUE OF PROPERTIES

☐ ☐

Property Name

Market Value

\$

\$

\$

14. DO YOU WISH TO DISCUSS HOW REDUCTION OF INTEREST DEDUCTIBILITY WILL AFFECT YOU?

☐ Y ☐ N

H COMPANY INFORMATION

ENCLOSED N/A

15. DIVIDEND DISTRIBUTIONS

Please provide details of dividends paid for the year

☐ ☐

\$

16. CAPITAL COMMITMENTS

Please provide details of any capital commitments

☐ ☐

\$

17. 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

2025 Property Investment Questionnaire

I TRUST INFORMATION

ENCLOSED N/A

18. GIFTING & TRUST DOCUMENTS

Please provide gifting documents and Trust deeds
(For new clients only)

☐ ☐

\$

19. CHANGES IN TRUST DETAILS

Please provide information regarding changes to the trust
(Including trustee/beneficiary changes, child beneficiary ages etc.)

☐ ☐

J HOW WOULD YOU LIKE TO SEND US YOUR DOCUMENTS

via Xero Portal

☐

via Email

☐

Hard Copy

☐

K HOW WOULD YOU LIKE TO RECEIVE YOUR COMPLETED DOCUMENTS

Collect documents from PKF Withers Tsang office

☐

Collect documents and meet with accountant/partner to review the results

☐

Courier to home/office address

☐

Post to home/office address

☐

Email and post copies to home/office address

☐

(Please note we are not responsible for any loss of documents sent via courier or post and a courier
(signature required) must be used if package is too large for standard NZ postal delivery)

Your Name:	Signature:	
Name of Partnership/Company/Trust:	Designation:	
Email:	Phone:	
Postal Address:		Date:

PLEASE REMEMBER TO COMPLETE THE TERMS OF ENGAGEMENT