

Individual- Please complete this annual questionnaire and provide us with information for your Income Tax Return.

Name: _____

Balance Date: _____

Records Required

Income-

1. Did you receive interest or dividends during the year? If yes, please supply RWT certificates & dividend statements	YES / NO
2. Do you have a KiwiSaver account? If yes, please supply Annual Tax Certificate.	YES / NO
3. Do you have any share income from a partnership, trust, estate, company that we don't prepare?	YES / NO
4. Are you a trustee of a foreign trust? If yes, please supply details of these-	YES / NO
5. Please supply details of all overseas income including, overseas interest, dividends, wages received, and taxation paid. <i>Note: New Zealand residents are liable for all world-wide income.</i>	
6. Do you own or hold any Crypto currencies?	YES / NO
7. Do you hold any overseas life policies/superannuation or pension schemes? If yes, please provide details of any amounts received during the year.	YES / NO
8. Do you use the services of a portfolio adviser? If yes, please provide a Portfolio adviser statement-	YES / NO
9. Do you have more than \$50,000 (cost price) invested in shares in companies? Other than those listed on the NZ and AUS stock exchanges. If yes, we require cost of investment and market value at start and end of year.	YES / NO
10. Do you have student loans?	YES / NO
11. Did you incur any expenses relating to earning your income- Income protection insurance or interest on loans used to purchase investments? If yes, please provide confirmation of any premiums paid for income protection insurances. Please include details and invoices for other expenses.	YES / NO

Property-

1. Have you bought or sold property in the financial year? If yes, please supply solicitors settlement statements, S&P agreement and loans details	YES / NO
2. Do you have rental properties? If yes, please supply details of income and expenses for these properties.	YES / NO
3. Do you have any income for short term rentals? (i.e. Airbnb) If yes, please supply details-	YES / NO
4. Rental Income/Mixed Use Holiday Home If rent received exceeds \$4000 please complete the separate questionnaire for each property.	YES / NO

Donations-

1. Did you make any donations during the year? If yes, please provide donation receipts	YES / NO
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Working for Families -

1. Do you think you will be eligible for working for families (family assistance)? If yes, please supply details of your children below-	YES / NO
<u>Childs Name-</u> <u>Date of Birth-</u> <u>IRD No.</u>	

Covid-19 -

1. Did you receive any COVID-19 support payments? If yes, please provide details of payments received.	YES / NO
2. Did you receive the Small Business Cashflow Scheme Loan?	YES / NO

I authorise you to prepare my taxation return. I undertake to supply all information necessary for you to perform this work and will be responsible for the accuracy and completeness of such information. You are authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to complete the above assignment. I also authorise you to act as my agent in dealings with all taxation matters with Inland Revenue.

Signature:

Date:

By doing so, you are acknowledging that you accept the above terms and conditions of the engagement.

Inland Revenue prefers to pay any refunds by direct credit.

Can you please advise the bank account number you would like any refunds deposited to.

Bank Account No.