Individual Questionnaire -

Ensure this questionnaire is completed and included with your records

Client Name:	Phone:	
IRD Number:	Balance [Date:
Email:		

Signature]	Date	

Records Required	✓	Comments
Wages/National Superannuation/Benefits		T
Please provide us with the names of any organisations you have received the following from:		
■ Wages		
Termination or incentive payments		
ACC payments		
National Superannuation		
Any other benefits		
In most cases IRD will have sent us these details direct, however we do need to check all details have been included.		
Student Loan		
Do you have a student loan?		
If so, please provide your latest statement from IRD		

Interest and Dividends		
Please supply the advice slips.		
 For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March 		
■ If any dividends are taken as bonus shares, also include these advice slips		
Rental and Leased Property		
Please complete attached rental questionnaire		
Mortgage Interest Paid on Residential Properties	l l	
·		
Have you incurred interest on residential properties owned (which is not your main family home or a 'new build*')? Is the interest also against properties other than residential rentals? If so, please provide details of amount of interest and dates paid.		
* A new build is a self-contained residence that receives a Code Compliance Certificate confirming the residence was added to the land on or after 27 March 2020		
Partnerships, Trusts, Estates and Companies		
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.		
Overseas		
 Supply details of overseas interest, dividends, wages received, any other income, and taxation paid Provide details of any overseas investments held at any time during the financial year Attach all of your investments advisor's reports Have you at any point in your lifetime, ever contributed to a foreign superannuation scheme, even if you cannot receive the benefits until you retire? 		
Any Other Income		
AU		
Attach details: Income Replacement Insurance Policy – provide details of premiums and claims		
■ Look Through Company or Partnerships – if you have been allocated a		
share of income or a loss other than from a company that we are aware of, please provide details		
 Did you receive non-taxable income from any other sources? If Yes, please provide details. 		
Donations		
Do you want us to complete your rebate claim form? Yes 🗌 No 🗌		
If so, please attach receipts.		
Working for Families Tax Credits and Parental Tax Credit		
Total Tax Ordina Tax Ordina Tax Ordina		
Please supply full names and birth dates of all children. Please note the following:		
 If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them 		
 Where a child has become financially independent during the current financial year, please advise the date they left school or home 		

Child's Name	IRD No.		Date of Birth	Date left School
		_		
		_		
		_		
		_		
		_		
If you have received Working for Families Tax Credits during the supply the certificate issued to you by IRD, detailing the amount				
Also provide details of any child support or maintenance paym received.	ents made or			
If we do not prepare your spouse or partner's taxation return, pus with details of their income.	lease provide			
Have there been any changes to your family circumstances, in change in responsibility for your dependent child(ren), you hav separated or otherwise changed your family circumstances? It provide details.	e married,			
Do you share custody of your child(ren) with anyone other than If so, please provide details.	n your partner?			
Did you work on average less than 20 hours per week if single your spouse / partner combined work less than 30 hours per w please provide details.				
Additional income information - Working for Families	s Tax Credits			
You are required to supply details of income received from the sources:	following			
 Salary exchanged for private use of a work 				
 Vouchers and other short-term charge facilities 				
 Major shareholder in a close company 		$H \perp$		
 Non-locked-in PIE income 		H		
Certain pensions and annuities				
Distributions from retirement savings schemes				
Distributions from superannuation schemes Tay example superange pagainne		HI		
Tax-exempt overseas pensions Tax exempt salary or wages		片		
 Tax-exempt salary or wages Other income (if you or your partner get more than \$5000 per 	er vear to help	H		
with your living costs)	or year to neip			
Children's passive income				
 Non-resident spouse or partner's income 				
 Non-beneficiary distributions from a trust 				
 Non-resident borrower's overseas income 				
■ Losses				
Settlor's attributable trustee income				
Attributable fringe benefits Main income agualisation ashama denseits				
Main income equalisation scheme deposits Main income equalisation scheme refunds		H		
Main income equalisation scheme refunds Retirement savings schemes contributions				
 Retirement savings schemes contributions Income from a retirement savings or superannuation scheme 	e PIF			
 Depreciation recovered on sale of a building 	· . IL			

		1	
A detailed description and examples of above income types is available from the IRD website: https://www.ird.govt.nz/income-tax-for-individuals/adjust-your-income/types-of-income			
Residential Land Withholding Tax	1	1	
Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? If so, provide details e.g. IR1100 Residential land withholding tax return and other sale and purchase documents.			
Residential Property Sales			
Have you sold any residential property during the year (not otherwise detailed on the information provided)?			
If yes, when was the property purchased?			
If it was purchased within 10 years of the sale date,			
what was the original purchase price		\$	
• and the sale price?		\$	
		Ψ	
 has it been used as your main home for the full time it has been owned? If not, please provide dates and details on the nature of the shared use. 			
Mixed Use Holiday Home			
Do you have a property (such as a holiday home or a bach) that is used private	ely and	also to derive income?	
If yes, provide details of property:		Yes No No	
Was the property empty for 62 days or more in the income year? If yes, please complete the following section so we can determine the amount	of allow	Yes	
Mixed Use Holiday Home – Information Required			
The number of days the property was empty during the income year			
The number of days the asset was used by family or associated persons* duri 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	;		
If there is more than one tenant who used the property through the year, pleas	e attacl	n details.	
Name of tenant:			
Relationship to owner (if any):	_		
Amount of rent they paid: \$	_		
Dates rented (From: To)			
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 tena	ints	Ψ	
Mortgage interest	iiio	\$	
Rates		\$ \$	
Insurance		\$	
Repairs/maintenance for general wear and tear		\$ \$	
Other (places give details)			
Other (please give details):			

Mixed Use Boat or Plane		
Do you have a boat or plane (with a market value of \$50,000 or greater), that is u	used privately and also to derive	
income?	Yes 🗌 No 🗍	
If yes, provide details:		
Description:		
Market value: \$		
Was the asset unused for 62 days or more in the income year? If yes, please complete the following section so we can determine the amount of	Yes \(\sum \text{No } \subseteq \) allowable deductions.	
Mixed Use Boat or Plane - Information Required		
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 v	with the entity owning the property	
For non-associated persons where payment received is at least 80% of market v	value:	
Number of days the asset was used:		
Income received: \$		
Expenses incurred in respect of the property (the list below is not exhaustive – derequired):	etails of all expenses will be	
Cost of advertising for hireage	\$	
Cost of repairing damages caused by hireage	\$	
Operating costs / supplies	\$	
Insurance	\$	
Repairs/maintenance for general wear and tear	\$	
Other (please give details)		
Cryptoassets		
Have you received or traded in cryptoassets during the income year? If so, please provide the following information:		
The type of cryptoasset		
 For each transaction provide the date, type of transaction i.e. received or disposed of, number of units, value in NZD 		
 Total units of each cryptoasset held at the beginning and end of the year 		
Exchange records and bank statements		
Wallet addresses		
	1 1	

Thank you for completing this questionnaire Don't forget to sign it