

Individual Tax Questionnaire

Please complete a separate questionnaire for each individual

Name

Email address

Income and Adjustments

Please attach all certificates, notices, butts etc

- | | | |
|---|--|--------|
| A | IRD summary of earnings | Yes/No |
| | Student loan repayments deducted from wages | Yes/No |
| B | a) Interest and Dividends: Bank Advice Notice/Butts: Trust Income | Yes/No |
| | b) How Many? | _____ |
| C | Estate or Trust income not in B above. | Yes/No |
| D | Overseas Income or Interest in a Foreign Company - Details please | Yes/No |
| E | Partnership income – Active | Yes/No |
| | Partnership income – Passive e.g. rental | Yes/No |
| F | a) Company Income | Yes/No |
| | b) Does your company receive 80% or more of its income from one source from personal services or one or more sources which are related? E.G. 2 companies having much the same shareholding. | Yes/No |
| G | a) Rental Income (Ask us for a schedule) | Yes/No |
| | b) Have you sold any real estate on which you have claimed depreciation? | Yes/No |
| H | Profit earned as a sole trader | Yes/No |
| I | Other Income (Supply full details) | Yes/No |
| J | Do you have a claim for Loss Attributing Qualifying Company losses? | Yes/No |
| K | Losses brought forward: Please include IRD Notice | Yes/No |

Expenses (KP 25)

- | | | |
|---|--|--------|
| L | Income protection insurance. If claimed in business put NO | Yes/No |
| M | Expenses against “active” partnership Income – provide details | Yes/No |
| N | If not paid by business, how much did you pay to have your tax return completed last year? | \$ |
| O | Have you made student loan payments to the IRD | Yes/No |

Deductions

- P a) Have you paid interest on money borrowed to buy shares
 or an interest in a business? Paid to..... \$..... Yes/No
- Q Expenses against "Passive" income e.g. monitoring fees Yes/No

Low Income Rebates

- R a) Do you work full time? i.e. 30 hours or more per week Yes/No
- b) If NO - how many hours per week _____
- How many weeks per year _____
- c) Your age if under 15 or under 19 and still at school during year _____

DECLARATION

Please complete my Tax return based on the information contained in this questionnaire. I also give you my full authority to contact my Bank or any other financial organisation, my lawyer, Work & IncomeNZ and the Inland Revenue Department for any purposes relating to my affairs. This authority also applies for the client linking system with IRD (for all tax types) and yourselves as Tax Agents. I accept responsibility for the accuracy and completeness of the information supplied and used in the preparation of my income tax return. I further accept responsibility for all judgement decisions made in respect of my taxation affairs and will not hold your firm responsible should IRD subsequently challenge any aspects of the tax return.

ACCOUNTANCY FEE

I understand fees for preparing my tax return and any related accounting and for all consultations are charged on the basis of the time taken to do my work and the degree of knowledge and skill of your staff members involved in the assignment. Due to the complex nature of tax law and the harsh penalties for mistakes, your firm will only accept responsibility for tax advice supplied by its principal.

Signed _____

Dated ____/____/____