

## Personal taxation questionnaire

Name:	
Address:	
E-Mail address:	
Home phone:	
Business phone:	
Fax no:	
IRD number:	
Date of birth:	
Convenient time to contact:	
Spouse's name:	
Spouse's IRD number:	
Spouse's date of birth:	
Spouse's income:	
Names of children & years of birth:	

*When the numbers count*

To assist us in the completion of your personal return please answer the following questions in ALL cases:

If your answer is 'Yes' please supply details

## Income

1. Did you receive any of the following?  
Salary or wages, Accident Compensation Earnings,  
Unemployment or other Income-tested benefits,  
Family Assistance Payments from Income Support,  
Withholding Payments. Yes / No
  
2. New Zealand Superannuation (enclose personal tax summary). Yes / No
  
3. Other NZ pensions, annuities and superannuation. Yes / No
  
4. Interest (include details of interest, enclose RWT form from payer showing interest PAYE paid to IRD). Yes / No
  
5. Dividends (Dividend Statements must be attached), this includes dividends paid, for example, by the power companies Mercury Energy, Power New Zealand etc. Yes / No
  
6. Shareholder-employee salary of director fees from a company where we do not prepare the accounts. Yes / No
  
7. Non-cash benefits from a company in which you are a shareholder and on which FBT has not been paid. - *For example: A low interest loan.* Yes / No
  
8. Income from Rents (*If yes, complete rental section*). Yes / No
  
9. Do you have a mixed use holiday home (that is rented and used privately)?  
*If yes, please enclose details of days used privately and days rented.* Yes / No
  
10. Income from Estate / Trust / Partnership / Business where we do not prepare accounts (include details of any tax credits). Yes / No

## When the numbers count

11. Income from the sale of Land / Business. Yes / No
12. Income from the sale of Shares or other property (not your residence). Yes / No
13. Income from the sale or redemption of securities. Yes / No
14. Any other Income, eg: royalties. Yes / No
15. Income from any Government Bonds? Yes / No  
*(Attach details of accrued interest on purchase of bond).*
16. *Overseas Earnings and Investments / Foreign Rights Disclosure:  
 (Attach details of any Overseas Earnings and Investments and taxation paid on these earnings.)*

Please give details if you held rights such as shares; units; or an entitlement to benefits in any foreign company, unit trusts, superannuation schemes or life insurance policies.

## Expenses

1. If you received income from withholding payments did you have work related expenses? Yes / No
- Attach details of:
- |                                  |                             |
|----------------------------------|-----------------------------|
| Purchases                        | Interest                    |
| Advertising                      | Vehicle                     |
| General                          | Other work related expenses |
| Printing, Postage and Stationery |                             |
2. Have you incurred any expenses related to earning your income? Yes / No  
 e.g. A fee for the completion of a Tax Return, commission on interest or dividend income, interest on funds borrowed to invest an income earning asset.
- Premiums on loss of earnings insurance, provided the benefit from the insurance policy is taxable (income protection). Yes / No  
*If yes, please attach details.*

## Rebates

*When the numbers count*

1. For Family Assistance Credits:  
Please telephone us for further information if you believe you may be eligible.
  
2. If you have a Special Home / Farm / Fishing Vessel Ownership Account.  
Please attach your "Increase in Savings Certificate" IR30 from your savings institution.

## Other

1. If you received income from rent please complete:

Address of property: \_\_\_\_\_

Rent received: \$ \_\_\_\_\_

The number of months the property was available for renting \_\_\_\_\_

Expenses:

Advertising	\$ _____	Tip Fees	\$ _____
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Insurance	\$ _____	Mortgage Interest	\$ _____
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Rates	\$ _____	Postage and Stationery	\$ _____
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Repairs and Maintenance	\$ _____	Agent's Collection Fees	\$ _____
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Car use for rent collection and maintenance \_\_\_\_\_ km / mile

*If property purchased or sold during year attach solicitor's statements.*

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|--|----------|
| 2. Are you a shareholder in a Look-through Company for which we do not prepare accounts? | Yes / No |
|--|----------|

Has owners' basis calculation been checked?	Yes / No
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*When the numbers count*

*Please supply the following details:*

<u>Name of Company</u>	<u>IRD Number</u>	<u>Amount of Loss to be Claimed</u>
_____	_____	_____
_____	_____	_____

3. Rebates: Do you have a Student Loan? Yes / No  
*If yes, have you made any extra payments? If so, please give details.*

4. If you have any other matters which might be important in determining your tax position that you feel you should discuss with us please note them here.

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5. If you are due for a terminal tax refund please indicate how you wish it to be paid:

Refunded in full

*When the numbers count*

Offset against Next Provisional Tax

Offset against ACC Levies

Transferred to Student Loan

Transferred to taxpayer named below

Name:

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IRD Number:

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*Note: If you have any outstanding tax or are in arrears with child support payments, your refund will be transferred by the Inland Revenue Department automatically to cover your debt.*

#### DECLARATION

I accept responsibility for all records and information supplied to you for the purpose of preparing my Income Tax Return. I accept responsibility for any failure by me to supply all relevant records and information to you.

I .....hereby authorise ..... to obtain from any third party any records or information you require for the purpose of preparing my Income Tax Return and accordingly any such third party is authorised to provide you with information required.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

*Your time and effort in completing this form is much appreciated by the team at iFigure.*

*When the numbers count*