Individual Financial Statements Questionnaire – 2023

Ensure this questionnaire is completed and included with your records

Client Name:	Phone:	
Email:		

To: McConnell Stafford-Bush & Associates

Terms of Engagement

I hereby instruct you McConnell Stafford-Bush & Associates and staff/contractors as applicable to prepare my Taxation Returns for the 2023 year. I undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information.

Authority is given to obtain information from Inland Revenue, other government agencies and financial institutions about all tax types (except child support), bank and loan accounts in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels including electronic ones.

I authorise your organisation to act as my agent for ACC levy purposes for all associated entities. This authorisation allows your organisation to query and change information on my ACC levy account(s) through ACC staff, and through MyACC for Business. This authority will also allow your organisation's main representative discretion to delegate access to my ACC information to other members of your organisation. Other delegated members of your organisation will also be able to query and change information on my ACC levy account.

You are to represent me as my tax agent. All income tax returns will be signed by me however you are authorised to sign any other taxation return on behalf of myself or any of my associated entities.

I also accept that you have the right to charge interest on overdue accounts at the rate of 2.0% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I accept that any collection costs you incur will be fully recoverable from me.

Signature Date		
Records Required	✓	Comments
Wages/National Superannuation/Benefits	•	•
 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		1
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 th 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		1
Please complete attached rental questionnaire		

Partnerships, Trusts, Estates and Companies		1		
Please supply details of income earned from any entity for which we prepare the accounts and tax returns.	do not			
Overseas				
 Supply details of overseas interest, dividends, wages received, income, and taxation paid Provide details of any overseas investments held at any time d financial year Attach all of your investments advisor's reports 	uning the			
 Have you at any point in your lifetime, ever contributed to a fore superannuation scheme, even if you cannot receive the benefit retire? 				
Any Other Income				
 Attach details: Income Replacement Insurance Policy – provide details of prem claims 	niums and			
 Look Through Company or Partnerships – if you have been allo share of income or a loss other than from a company that we ar 				
 of, please provide details Did you receive non-taxable income from any other sources? If please provide details. 	Yes,			
Donations				
Do you want us to complete your rebate claim form? Yes No				
Working for Families Tax Credits and Parental Tax Credit				
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	<u>No</u> .		Date of Birth	Date left School
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If you have received Working for Families Tax Credits during the year, please supply the certificate issued to you by IRD, detailing the amounts.		
Also provide details of any child support or maintenance payments made or received.		
If we do not prepare your spouse or partner's taxation return, please provide us with details of their income.		
Have there been any changes to your family circumstances, including a change in responsibility for your dependent child(ren), you have married, separated or otherwise changed your family circumstances? If so, please provide details.		
Do you share custody of your child(ren) with anyone other than your partner? If so, please provide details.		
Did you work on average less than 20 hours per week if single or did you and your spouse / partner combined work less than 30 hours per week? If so, please provide details.		
Additional income information - Working for Families Tax Credits		
You are required to supply details of income received from the following sources:		
 Salary exchanged for private use of a work Vouchers and other short-term charge facilities Major shareholder in a close company Non-locked-in PIE income Certain pensions and annuities Distributions from retirement savings schemes Distributions from superannuation schemes Tax-exempt overseas pensions Tax-exempt salary or wages Other income (if you or your partner get more than \$5000 per year to help with your living costs) Children's passive income Non-resident spouse or partner's income Non-resident spouse or partner's income Non-resident spouse or partner's income Losses Settlor's attributable trustee income Attributable fringe benefits Main income equalisation scheme deposits Main income equalisation scheme refunds Retirement savings schemes contributions Income from a retirement savings or superannuation scheme PIE Depreciation recovered on sale of a building 		
Residential Land Withholding Tax	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 		<u>\$</u>			
• and the sale price?		<u>\$</u>			
 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 privately		Yes 🗌 No 🗌			
If yes, provide details of property:					
Was the property empty for 62 days or more in the income year? Yes No I fyes, please complete the following section so we can determine the amount of allowable deductions.					
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* during 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, please	attach	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 – d required):	letails	of all expenses will be			
Cost of advertising for tenants		\$			
Cost of repairing damages caused by tenants \$					
Number of days spent in the property while repairing damages caused by tenants					
Mortgage interest		\$			
Rates \$					
Insurance \$					
Repairs/maintenance for general wear and tear \$					
Other (please give details) :					

Mixed Use Boat or Plane			
Do you have a boat or plane (with a market value of \$50,000 or great	ter), that is 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	Yes 🗌 No 🗌 e amount of 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 pers	cons* 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 with the entity owning the property			
For non-associated persons where payment received is at least 80%	of market value:		
Number of days the asset was used:			
Income received: \$			
Expenses incurred in respect of the property (the list below is not exh required):	naustive – details 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? please provide the following information:	? If so,		
The type of cryptoasset			
 For each transaction provide the date, type of transaction i.e or disposed of, number of units, value in NZD 	e. received		
 Total units of each cryptoasset held at the beginning and er year 	nd of the		
Exchange records and bank statements			
Wallet addresses			

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