

2026 Individual Questionnaire

Ensure this questionnaire is completed and included with your records

Client Name		Phone	
Balance Date		Email	

To: Abacus Chartered Accountants Ltd

Terms of Engagement

I hereby instruct Abacus Chartered Accountants Ltd and staff/contractors as applicable to prepare our Taxation Returns for the 2026 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.

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

I/We also accept that you have the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment within 14 days following invoice date. The charging of such interest will be at your discretion. I/We accept that any collection costs you incur will be fully recoverable from me/us.

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 - 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.	☐ ☐ ☐ ☐	
Interest and Dividends		
Please supply the advice slips. - For interest received, you should have an annual advice notice showing the withholding tax deducted. This can be downloaded from internet banking, or 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 also complete the rental questionnaire.	☐	
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.	☐	

Mixed Use Holiday Home

Does this entity have a property (such as a holiday home or a bach) that is used privately and also to derive income?

☐

Details of property:

Was the property empty for 62 days in the income year? If yes, 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 property 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 with the entity owning the property

☐

If there is more than one tenant who used the property through the year, please attach 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 tenants

Mortgage interest

\$

Rates

\$

Insurance

\$

Repairs/maintenance for general wear and tear

\$

Other (please give details)

Thank you for completing this questionnaire - don't forget to sign it.