



Individual Questionnaire and Information Declaration

Name:					_
Physical Address:					_
Postal Address:					_
Business Phone:	Fax:				
Home Phone:	Mobile:				_
Email:					_
SUMMARY OF EAR	NINGS				
Our Office automation	cally receives details of your Summary of Earnings direc	tly from Inland Revenue			
VETERANS PENSIO Did you receive a Ve		Y	/ES	/	NO
OVERSEAS PENSION Did you receive an C		Y	ES .	/	NO
STUDENT LOAN Did you have a Stud	ent Loan as at 31 March 2024 ?	Y	ES .	/	NO
_	ES / CREDITS INFORMATION r you were a NZ Resident Taxpayer?	Y	/ES	/	NO
Is this Return fo	r a full year?	Υ	/ES	/	NO
Did you either a	rrive in, or depart from New Zealand during the year end	ded 31 March 2024 ?	/ES	/	NO
Did you forgive	any Debts owed to you during the period 1 April 2023 t	o 31 March 2024?	/ES	/	NO
RESIDENTIAL PRO • Have you bough	PERTY nt or sold residential property or land during the period 1	April 2023 to 31 March 2024?	YES	,	NO

INTEREST - NEW ZEALAND INTEREST BEARING FUNDS

Please provide all Interest Certificates received for the period **1 April 2023 to 31 March 2024**. Certificates are not provided for Interest under \$20.00 – please obtain this information from your Bank / Investment Institution.

Where Funds Held	Multi Cert No.s	Year-End Balance	Joint Y/N	RWT Deductions	Gross Interest

DIVIDENDS - NEW ZEALAND SHARES AND DIVIDENDS

Please provide details of all Share movements and Dividends paid to you, along with any Withholding Tax deducted on your behalf and Imputation Tax Credits available to you. We require all Dividend Certificates / Distribution Statements received for the period 1 April 2023 to 31 March 2024. An example is the Auckland Energy Consumer Trust Dividend.

Where Invested	Multi Cert No.s	No. of Shares at Year End	Joint Y/N	Imp Tax Credits	RWT Deductions	Gross Dividends

OFFSHORE INVESTMENTS – All amounts in Foreign Country Currency – we will convert to NZ Dollars

Please provide details of all Funds held offshore, Income earned, and Overseas Tax deducted

Where Funds Held Institution and Country	Multi Cert No.s	Year-End Numbers Or Value	Joint Y/N	Overseas Tax Deducted	Gross Foreign Income

ANY OTHER INCOME - Not listed elsewhere

Income	Amount

PIE'S - PORTFOLIO INVESTMENT ENTITIES

Please provide all relevant Certificates so we may ensure you have your correct Prescribed Investor Rate (PIR)

Where Invested	Multi Cert No.s	Year-End Balance	Joint Y/N	Prescribed Investor Rate (PIR)

EXPENSES

If your Business ceased, you are still eligible to claim on your final ACC Levy, Interest on Business Debts, Accountancy Fees, etc incurred during the 2024 tax year

- · Expenses against Withholding Tax related Earnings, e.g. Labour Only Contractors, etc
- Costs incurred for the collection of Interest Income, e.g. Solicitors Commission
- Expenses you may claim in your Tax Return include Accountancy Fees, Investment Fees, Income Protection Fees, etc please provide details for each expense

Expense Type / Paid To	Receipt Y / N	Amount

DONATION RECEIPTS

Receipts must be provided for all donations \$5.00 and over.

Donation(s) Paid To	Receipt Y / N	Amount

WORKING FOR FAMILIES TAX CREDIT INFORMATION - Please provide a copy of Birth Certificate(s)

•	not already held by our Office.							
•	Did you start / cease living with a Pa	rtner during the pe	eriod 1 April 2023 to 31 March	2024 YES / NO				
	If yes, please provide:							
	Date Started	Date Ceased						
	Partners Full Name							
	Partners IRD Number							
	Full Name(s)		Date of Birth	IRD Number				
NFC	DRMATION DECLARATION AND AU	THORITY INSTR	UCTION					
all i com expr ulfil Banl	hereby instruct you to prepare my/onformation necessary to carry on pleteness of such information. You ession by you of an opinion on the ling of any statutory audit requirem kers, Solicitors, Finance Companies in such further information as your	ut such service ur services are n e financial staten ents. You are he s, Inland Revenu	s, and will be responsible ot intended to, and according nents in so far as third partie reby authorised to communic e Department and other pers	for the accuracy and gly will not result in the s are concerned, or the ate with the appropriate ons or organisations to				

Client Signature Client Name Date