

ANNUAL QUESTIONNAIRE

INDIVIDUAL 2026

WAIMATE ACCOUNTANTS

• LIMITED •

Client _____

Balance Date ____/____/____

Telephone _____

Mobile _____

Email _____

Physical Address _____

(Include RAPID Number and postcode)

Engagement of Professional Services

Waimate Accountants Limited agrees to provide the following professional services:

- Preparation of financial reports and tax returns based on information provided to us in accordance with SES-2. Our procedures do not include verification of financial information. No audit or review engagement is undertaken.
- We will report on any matters that come to our attention in the process of undertaking your work.
- We will provide any other services as are agreed upon between us from time to time.

You agree and confirm:

- You will supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information.
- We may obtain any further information necessary for the completion of your engagement from any third party you had dealings with during the year for the named above or other entities that you have interests in that effect the financial reports. This will normally be financial institutions and legal firms.
- To authorise Waimate Accountants Limited to link to all tax types (except child support) at the Inland Revenue Department and to obtain information through all media and communication channels necessary to fulfil the agency responsibilities as your accountant and tax agent. We will not be liable for any penalties imposed by IRD as a result of incomplete records supplied to us.
- To authorise Waimate Accountants Limited to access and change information through My ACC and directly with ACC staff.
- Full terms and conditions of our engagement are available on our website.

Price and Payment

Our fees are based on hours worked charged at rates appropriate to the work performed and the levels of expertise required, plus out of pocket expenses. If requested by you we will advise you of our estimated fee for the work to be undertaken. If our costs seem likely to exceed this figure, we will discuss the matter within a reasonable timeframe.

Our fees are payable by the 20th of the month following the invoice date. In the event that it is necessary to take legal action to recover overdue accounts, all collection costs incurred by us will be incurred by you.

Signature: _____

Full Name: _____

Date Completed: ____/____/____

WAIMATE ACCOUNTANTS LIMITED
PHONE: 03 689 8551
WEB: www.waimateaccountants.co.nz
EMAIL: admin@waimateaccountants.co.nz
P O Box 64, Waimate 7960

INCOME

Income from the following sources will be supplied directly to us by the Inland Revenue:

- Wages
- Salary
- NZ Superannuation
- Veterans Pension
- Taxable New Zealand Income Support Benefits
- Accident Compensation Payments
- Family Support
- Workplace Insurance

Expenses incurred in earning withholding income can be claimed (where they have not been reimbursed). Please provide full details.

OVERSEAS INCOME

Did you receive any income from sources outside New Zealand during the year? YES / NO

Do you own shares in a foreign company? YES / NO

Do you own units in a foreign unit trust? YES / NO

Do you have a foreign life insurance policy? YES / NO

Do you have an interest in a foreign superannuation scheme? YES / NO

If you answered YES to any of the above, please attach details.

INTEREST AND DIVIDENDS (New Zealand and Overseas)

Please supply us with all dividend and interest certificates, including joint investments.

Please provide full details of source and amount received. Dividend, interest and bonus certificates slips are required to show interest withholding tax paid on your behalf and imputation tax credits available to you.

STUDENT LOAN

Do you have a Student Loan? YES / NO

OTHER INCOME

Please supply details of any cash income

Rents Received – please request a separate Rental Questionnaire if not already supplied

Partnership, Trusts or Estates, Overseas Income

If you have received income from a Partnership, Trust or Estate, please supply details and advice notes received. If the financial statements are **not** being prepared by us alternatively advise us of the other Accountant's contact details.

Name of Entity: _____

Gross Taxable Interest Income: \$ _____ Tax Paid: \$ _____

Gross Dividends: \$ _____ Tax Paid: \$ _____

Other Income: \$ _____ Tax Paid: \$ _____

EXPENSES	
The only expenses you can claim are:	
• A fee to someone completing your tax return. • Commission on interest or dividend income (but not bank fees – they are a private expense). • Interest on money you borrowed to buy shares or to invest – as long as the investment is expected to produce some taxable income. • Premiums on loss of earnings insurance provided any payouts from the insurance policy are taxable income.	
Are you able to claim for any expenses paid during the year?	YES / NO
If yes, attach details.	

- A fee to someone completing your tax return.
- Commission on interest or dividend income (but not bank fees – they are a private expense).
- Interest on money you borrowed to buy shares or to invest – as long as the investment is expected to produce some taxable income.
- Premiums on loss of earnings insurance provided any payouts from the insurance policy are taxable income.

YES / NO

WORKING FOR FAMILIES TAX CREDITS

If you believe you are entitled to Working for Families Tax Credits (WFFTC), please complete the back page.

WORKING FOR FAMILIES TAX CREDITS

If you believe you are entitled to Working for Families Tax Credits (WFFTC), please complete the back page.

TAX CREDITS FOR DONATIONS

- Total amount of your Donations to Charities \$ _____
(Please staple your donation receipts to the back of this form)
- Enter the bank account number you would like your rebate and any tax refund to be direct credited to:
(The Inland Revenue may also transfer the rebate credit against any tax arrears you have.)

Bank			Branch			Account Number								Suffix				

TAX REFUNDS

- Enter the bank account number you would like your tax refund to be direct credited to:

Bank			Branch			Account Number								Suffix				

- \$_____

[illegible]

Suffix

TAX REFUNDS

- Enter the bank account number you would like your tax refund to be direct credited to:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Bank Branch Account Number Suffix

- Enter the bank account number you would like your tax refund to be direct credited to:

[illegible]

Suffix

WORKING FOR FAMILY TAX CREDITS (WFFTC)

Do you have children aged under 18 years, or 18 years and attending secondary school or tertiary education? YES/NO

If NO, you do not need to complete the rest of this page.

If YES, please complete the following:

Family Details:

<u>Name of Child</u>	<u>Date of Birth</u>	<u>IRD Number</u>	<u>Date Left School</u>
.....	.../.../.....	-.....-.....	/...../.....
.....	.../.../.....	-.....-.....	/...../.....
.....	.../.../.....	-.....-.....	/...../.....
.....	.../.../.....	-.....-.....	/...../.....

There has been changes to the legislation to the types of income now included in your family income when applying or receiving WFFTC. As the changes affect your WFFTC claim, we require details of all family income.

Have you received any income from any other sources that we don't administer? YES/NO

Other Trust Income	YES/NO
Other Shareholder Income	YES/NO
Interest or Dividends (including PIE Income)	YES/NO
Fringe Benefits	YES/NO
Passive income of your children	YES/NO
Any payments used for day to day living expenses	YES/NO

PARENTAL TAX CREDITS

You may be entitled to a Parental Tax Credit if you have had a new child. If so your new child will require an IRD number.

Have you had a baby during the previous year? YES/NO

If YES, have you applied for Parental Tax Credit? YES/NO

WFFTC money received during the year.

Did you receive WFFTC during the year? YES/NO

If YES, How much did you receive? \$.....

Family Changes

Has there been any change in in your marital status (this includes defacto) during the previous year? YES/NO

Has there been a shared custody arrangement YES/NO

Child Support

Did you pay child support to an ex-partner? YES/NO

If Yes, How much did you pay? \$.....

Was this arrangement through IRD or Private? (Please circle) IRD / Private

Did you receive child support form an ex-partner? YES/NO

If YES, how much did you receive? \$.....

In Work Payment

You may be entitled to an In Work Payment depending on the weekly hours worked

In a single parent family you need to work more than 20 hours, for a two parent family you need to work more than 30 hours per week combined.

Does your family meet these requirements?

YES/NO

If YES, provide number of hours worked.

Parent 1.

Parent 2.

If your spouse files his/her own tax return, we will need a copy of this return to calculate the total family income.

Thank you for completing this questionnaire.