

Personal Questionnaire

Name:

Professional Services to be provided for the 2025/2026 Financial Year These services are in Terms of the Engagement/Agreement Letter Between You as Client and Graham and Dobson Ltd

Extracts From The Engagement/Agreement Letter

- You instruct Graham & Dobson Ltd to prepare Income Tax Returns and/or Financial Statements for the 2026 year. You undertake to supply all information necessary to carry out such services, and you are responsible for the accuracy and completeness of such information.
- You instruct Graham & Dobson Ltd to communicate with my/our bankers, solicitors, finance companies, insurance providers, suppliers, and all government agencies to obtain such information as you require to complete the engagement.
- You instruct Graham & Dobson Ltd to act as your tax agent in respect of all dealings with Inland Revenue and obtain personal information for all tax types via all media. You authorise Graham & Dobson Ltd to prepare, submit and sign taxation returns on your behalf.
- You authorise Graham & Dobson to furnish to any third party, financial information of yours as they see fit, that is requested in the furtherance of your business activities.
- We will charge for your work based on time engaged. Invoices issued to you will be payable on the 20th of the month following the date of the invoice unless a special arrangement has been made. We reserve the right to charge interest at the rate of 1.5% per month on fees outstanding past the due date.

Other Terms and Conditions

- All other terms and conditions of this engagement are as set out in the Engagement/Agreement Letter I/we signed as a client of Graham & Dobson Ltd. A further copy of the Engagement/Agreement Letter is available on request.
- Graham & Dobson Ltd has to comply with Anti Money Laundering (AML) regulations. We may be required to collect and verify additional information from you relating to your identity and source of funds for transactions.

Contact Details

- Please fill in with your contact details so we can ensure our database holds your most up to date details.

Mailing Address	Physical Address
<input type="text"/>	<input type="text"/>

Communication Details

Work Phone:	Mobile:
Home Phone:	Email Address:

Bank Account Details for Income Tax Refunds, fill in below or

Name

A/C No.

Copy & paste bank details here:

If an e-mail address is supplied Graham & Dobson Ltd will communicate with you by that means, including your financial information, unless you advise otherwise.

Client Signature

Date

PLEASE SIGN

Personal Questionnaire

Date of Birth

1 Was any Interest received during your Financial Year?

No Yes If Yes, please provide all details.

Supply interest advice notices received from banks, companies and financial institutions. (These may be received electronically, please print off and include)

2 Were any Dividends Received during your Financial Year?

No Yes If Yes,

Supply dividend advice notices received from banks, companies and financial institutions. (These may be received electronically, please print off and include)

Include all advices including where bonus shares are received in lieu of dividends

To ensure Tax Credits are correctly included all advice notices must be provided - you may even be entitled to a refund!

3 Do you have an investment portfolio and/or invest with a similar investment platform?

No Yes If Yes, please provide the Investment and Tax Reports.

<input type="checkbox"/>	Craigs Investments Partners
<input type="checkbox"/>	Forsyth Barr
<input type="checkbox"/>	Hatch
<input type="checkbox"/>	InvestNow
<input type="checkbox"/>	Sharesies
<input type="checkbox"/>	Other:

4 Did you Receive any Income from Overseas Sources?

No Yes If Yes, please provide all details.

5 Do you own Investments in any country other than New Zealand (even if you do not receive income) including Foreign Pensions, Foreign Life Insurance Policies, or received an Inheritance?

No Yes If Yes, please attach details

This information is required to determine whether your overseas investments are required to be taxed under the Foreign Investment Fund (FIF) Rules

6 Did you Receive any Income from PIE Funds?

No Yes If Yes, please provide all details.

Personal Questionnaire

7	Was Income Paid or Credited to you from a Trust, Partnership, LTC, and/or Company?		
----------	---	--	--

No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	If Yes, please provide details:
----	--------------------------	-----	--------------------------	---------------------------------

Please answer the following questions if the Financial Statements for the Partnership/Trust/Estate you received income from were not prepared by Graham & Dobson Ltd:

- Name and IRD Number of the Estate/Trust/Partnership the income was received from
- Details of any tax credit or tax paid for you
- What type of income was it e.g. Interest, Farming etc
- Contact person/name of firm who prepared Financial Statements

8	Was Rent Received from any Residential, Rural, Air BnB and/or Commercial Property Investment?		
----------	--	--	--

No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	If Yes, please provide details of:
----	--------------------------	-----	--------------------------	------------------------------------

- Rent received and expenses paid, i.e. rates, insurance, advertising, mortgage interest, repairs & maintenance, property management fees
- If the property was not rented for a full 12 months, please provide details of when and why it was vacant.
- If the property was sold or purchased during the year please provide statement from solicitor
- Any visits to inspect the property during the year showing date, details and km's travelled.

9	Do you have a property, such as a holiday home or a bach that is used part time privately and also rented out?		
----------	---	--	--

No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	If Yes, please supply details of income and expenses and the following.
----	--------------------------	-----	--------------------------	---

- | | |
|--------------------------|------------------------------------|
| <input type="checkbox"/> | Number of days used privately |
| <input type="checkbox"/> | Number of days property was empty |
| <input type="checkbox"/> | Number of days property was rented |

10	Did you own any Crypto Assets during the income year?		
-----------	--	--	--

No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	If Yes, please provide details of
----	--------------------------	-----	--------------------------	-----------------------------------

- Type of Crypto Asset
- Movements for the year i.e. received, disposed, traded; the associated date of movement, number of units, and value in NZD.
- Total units of each crypto asset held at beginning and end of the year.
- Exchange records and bank statements
- Wallet addresses

11	Did you own any Precious Metals during the income year?		
-----------	--	--	--

No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	If Yes, please provide details of
----	--------------------------	-----	--------------------------	-----------------------------------

- Type of metal held
- Movements for the year i.e. received, disposed, traded; the associated date of movement, number of units, and value in NZD.
- Total units of each metal held at beginning and end of the year.
- Exchange records and bank statements

Personal Questionnaire

12 Did you own any Carbon Credits/NZU's during the income year?

No Yes If Yes, please provide details of

- Type of credit held
- Movements for the year i.e. entitlement received, purchased, surrendered, sold; the date of the associated movement, number of units, and value in NZD.
- Total units of each held at beginning and end of the year.
- Exchange records and bank statements

13 Did you Receive Income from any Other Source?

No Yes If Yes, please provide details

14 Have there been any changes in your Investments during the year?

No Yes If Yes, please provide details

--

15 Have you purchased and/or sold a property during the income year?

No Yes If Yes, please provide

- Name of Solicitor involved
- Sale & Purchase Agreement
- Cash & Settlement Statement
- Invoices
- Any other details that are required

16 Did you pay any Loss of Earnings/Income Protection Insurance?

No Yes If Yes, please provide details

17 Do you have a Student Loan?

No Yes

Please provide your latest IRD statement and details of voluntary payments made to IRD during your Financial Year

18 Would you like Graham & Dobson to complete a Donations Rebate Claim on your behalf?

No Yes If Yes, please attach donation receipts

19 Did you receive any Working for Families Tax Credit Entitlement during the year ended 31 March 2026?

No Yes We will need to contact you for additional information

Personal Questionnaire

20	Did you have a child born during the year ended 31 March 2026?		
No	<input type="checkbox"/>	Yes	<input type="checkbox"/>

If Yes, please attach details

Please provide full name, date of birth & IRD number to enable us to apply for a Parental Tax Credit on your behalf. (Note: We are no longer able to apply for an IRD number on your behalf)

--

21	Did you have a child who became financially independent during the current financial year?		
-----------	---	--	--

No	<input type="checkbox"/>	Yes	<input type="checkbox"/>
----	--------------------------	-----	--------------------------

If Yes, please advise the name of the child and date they left school.

This alters the Working for Families Entitlement

--