

PERSONAL QUESTIONNAIRE - 2024

Name:	
Phone:	
Mobile:	
Fax:	
Email:	
Address:	

AUTHORISATION

I instruct Smart Tax Solutions Limited to prepare my income tax returns for the 2024 year. I undertake to supply all information required for this engagement and accept responsibility for the accuracy and completeness of such information. I acknowledge that no audit or review engagement will be performed and accordingly no assurance will be expressed on the tax returns, summary or related schedules.

I authorise Smart Tax Solutions Limited to obtain any additional information required for the preparation of my taxation return from our Solicitors, Banks, Government agencies and financial organisations.

Signature:

Date:

PERSONAL INFORMATION REQUIRED

Please complete this questionnaire carefully. The provision of complete information will assist us in doing your work more efficiently. Please only tick the boxes in each section if they are applicable to you (To tick the box, double click the checkbox and select "Checked").

1. Earnings from Employment National Superannuation

Earnings from Employment National Superannuation and Scheduling Income Subject to:

Did your earnings during the year include a redundancy payment?

Did your earnings during the year include a redundancy payment?

If yes, please provide details of any redundancy tax credit claimed:

This information is available to us from Inland Revenue provided you have authorised us to act as your tax agent.

2. NZ Investment Income

NZ Investment Income?

Please supply copies of all certificates for interest & notices for dividends received during the year

Did you buy or sell any shares during the year? If so, please provide details?

Did you invest in any NZ Portfolio Investment Entities (PIES) during the year?

If yes, please provide details & copies of distribution summaries for the year:

Did you purchase or sell any 'financial arrangements' (e.g. corporate bonds & capital notes Yes / No government & local body stock, futures, commercial bills, etc) during the year?

If yes, Please provide details:

3. Overseas income

Overseas income?

Did you have any overseas investments during the year?

If yes, Please provide details:

Did you hold any rights or an interest or shares in a foreign company, unit trust superannuation scheme or life policy at any time during the year?

If yes, Please provide details:

Did you have any bank accounts denominated in a foreign currency or any other off-shore investments?

If yes, Please provide details:

4. Rental Income

Rental Income?

If you received income from the rental or lease of property please complete a Rental section below

5. Business Income

Business Income?

If you received any income from a business you operate in your own name please complete a Business questionnaire (financial statements questionnaire).

6. Company, Trust, Estate, or Other Income

Company, Trust, Estate, or Other Income?

Please attach full details of any other income you received (e.g. business/partnership/trust/estate income, company shareholder/employee salary, overseas income, pensions, income protection insurance, royalties, income from share or property dealing, taxable Maori authority distribution)

7. Look-through Company Losses (LTC)

Look-through Company Losses (LTC)?

8. Expenses

Expenses?

Please attach full details of any expenses incurred in earning income (e.g. Income protection insurance, ACC levies, interest on loan borrowed for investment, etc.)

9. Donations Tax Credit & Childcare/Housekeeper Rebate

Donations Tax Credit & Childcare/Housekeeper Rebate?

If you would like us to complete these claims please provide all receipts. Did you make any donations via Payroll giving during the year? Please provide details:

10. Loan

Loan?

Did you borrow any funds to invest during the year? If yes, please provide details.

11. Working for Families Tax Credits

Working for Families Tax Credits?

If you or your partner started or stopped receiving Working for Families assistance during the year for any children please advise:

Name of Child	IRD Number	Date of Birth	Date left school