

PERSONAL QUESTIONNAIRE - 2026

Name:	
Phone:	
Mobile:	
Email:	
Address:	

AUTHORISATION

I instruct Smart Tax Solutions Limited to prepare the financial statements and tax returns for the year 2026. I undertake to provide all the information necessary for this engagement and accept full responsibility for the accuracy and completeness of that information. I acknowledge that no audit or review engagement will be performed, and accordingly, no assurance will be expressed on the financial statements or tax returns.

I hereby confirm that all income, including cash receipts, has been deposited into the designated bank account for the preparation of our financial statements and income tax returns.

I authorise Smart Tax Solutions Limited to obtain any additional information required for the preparation of my tax return from my solicitors, banks, government agencies, and financial institutions.

I authorise Smart Tax Solutions to approve and file my tax returns on my behalf. I acknowledge that Smart Tax Solutions may receive discounts or incentives from accounting software providers, which may not necessarily be passed on to us.

**Please type your full name beside "Signature" and enter the date. Your typed name will serve as your electronic signature and confirmation of the information provided.*

Signature:

Signature:

Date:

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. NZ Investment Income

Have you received any NZ investment income during the year?

Yes No

Shares: Did you buy or sell any shares during the year?

Yes No

If Yes, please provide details:

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

Yes No

If Yes, please provide details and copies of distribution summaries for the year:

Financial Arrangements: Did you purchase or sell any financial arrangements (e.g. corporate bonds, capital notes, government or local body stock, futures, commercial bills, etc.) during the year?

Yes No

If Yes, please provide details:

2. Overseas income

Have you received any **overseas income** during the year?

Yes No

Overseas Investments: Did you have any **overseas investments** during the year?

Yes No

If Yes, please provide details:

Foreign Entities or Policies: Did you hold any rights, interests, or shares in a foreign company, unit trust, superannuation scheme, or life policy at any time during the year?

Yes No

If Yes, please provide details:

Foreign Bank Accounts or Other Offshore Investments:
Did you have any bank accounts denominated in a foreign currency or any other offshore investments?

Yes No

If Yes, please provide details:

3. Rental Income

Have you received any **rental or lease income** from property during the year?

Yes No

If Yes, please complete the Rental section below (or attach supporting rental statements and documentation).

4. Business Income

Have you received any **income from a business** you operate in your own name during the year?

Yes No

If Yes, please complete the Business Questionnaire (Financial Statements Questionnaire).

5. Company, Trust, Estate, or Other Income

Have you received any income from a company, trust, estate, or other sources during the year?

Yes No

If Yes, please attach full details of any other income you received, such as:

- Business, partnership, trust, or estate income
- Company shareholder or employee salary
- Overseas income
- Pensions or income protection insurance
- Royalties
- Income from share or property dealing
- Taxable Māori authority distributions

6. Look-through Company Losses (LTC)

Do you have any **Look-through Company (LTC) losses** to report for the year?

Yes No

If Yes, please provide details:

7. Expenses

Have you incurred any **expenses related to earning income** during the year?

Yes No

If Yes, please attach full details of all expenses, including but not limited to:

- Income protection insurance
- ACC levies
- Interest on loans borrowed for investment
- Other expenses related to earning income

8. Donations Tax Credit & Childcare

Would you like us to complete **Donations Tax Credit** or **Childcare** claims for you?

Yes No

If Yes, please provide all relevant receipts.

Payroll Giving: Did you make any donations via
Payroll Giving during the year?

Yes **No**

If Yes, please provide details:

9. Loan

Did you borrow any funds to invest during the year?

Yes **No**

If Yes, please provide details: