



Personal Tax Questionnaire

Name: _____ Email: _____

Year Ended: 31 March 2026

INCOME	Comments	Additional information to send
Interest	Bank deposits in your name	RWT certificates from bank
Dividends	Shares in your name	Dividend Statements
Rental Income	This is income from properties in your personal name. Please ignore if your rental properties are owned by a Trust or Company	See our rental accounts checklist
Overseas Income	Includes property, shares, bank deposits, pensions, salary	Documents showing the income received and any foreign tax withheld
Overseas Assets	In NZ certain overseas financial assets are taxed regardless of whether income was received	Investment Statements showing balances at end of tax year
Self-employed income	This is income you received for work done which was not taxed as employment income / scheduler earnings	Total income received for the tax year and all business expenses
Estate Income	You may be receiving income from an estate while the deceased's financial affairs are being sorted out	Statement from Executors
Trust Income	Please ignore if we prepare tax returns for Trust which made the distribution.	Distribution Statement
Shareholder Salary	Income you received as a shareholder. Please ignore if we prepared tax returns for the companies of which you are a shareholder.	
Other Income	Any income (excluding employment income) not mentioned above.	Documentation or Amounts received
EXPENSES		
Donations	To charities and schools	Tax receipts issued by the charity
Income Protection Insurance	These can be claimed even if you are only earning income as an employee	Correspondence from Insurer confirming amounts paid for tax year
WORKING FOR FAMILIES		
	If you or your partner are claiming working for families, please advise us as we need to file an additional tax return on your behalf	
	Please provide details of: <ul style="list-style-type: none"> • Children's names, date of birth and IRD numbers • Child support payments received • Children earning passive income exceeding \$500 per annum • regular payments received to meet regular living expenses from family members / third parties exceeding \$5,000 per annum • Income not already advised to us 	

1. Declaration

I accept responsibility for the accuracy and completeness of the information supplied in the questionnaire which is to be used in the calculation of my personal income. You are not to complete an audit, nor do I wish you to undertake a detailed review of my affairs in to order to substantiate the accuracy of my information, and therefore you are not asked to provide any assurance on this information. I undertake your work can not be relied on to detect error and fraud and that you accept no liability for the accuracy and completeness of the information supplied by me.

I also accept responsibility for all other records and information supplied to you other than those listed above. I accept responsibility for any failure by me to supply all relevant records and information to you.

Signature: _____