



PO Box 31508 Milford, Auckland, New Zealand

Individual Questionnaire – 2025

Ensure this questionnaire is completed and included with your records. Please copy this questionnaire for each entity and phone us on (09) 489-5041 if you need any assistance.

Client Name		Phone:	
Balance Date:		Email:	

Terms of Engagement

I/We hereby instruct you to prepare my/our Financial Statements and Taxation Returns for the year/period ending 31 March 2025. I/We undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. I/We understand that you will rely upon the information provided by me/us. Your services are not intended to, and accordingly will not result in the expression by you of an opinion on the Financial Statements in so far as third parties are concerned, or in the fulfilling of any statutory audit requirements. I/We understand that during preparation of the Financial Statements and Taxation Returns you will not be specifically investigating non-compliance with laws and regulations – however should anything come to light of this nature during this process, you will bring that to my/our attention.

I/We understand that the Financial Statements and Taxation Returns are prepared for my/our own use and to determine my/our taxation liabilities. If this should change in any material respect, I/we will inform you immediately. You will not accept any responsibility to any person, other than me/us, for the contents of the Financial Statements.

All other terms and conditions of this engagement are the same as those referred to in the original Engagement Letter I/we signed when I/we became a client.

I/We also accept that all accounts are due for payment by the 20th of the month following invoice date.

You are hereby authorised to communicate with my/our bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to complete the above assignments.

You are to represent me/us as my/our tax agent. All income tax returns will be signed by me/us however you are authorised to sign any other taxation return on behalf of myself/ourselves or any of my/our associated entities.

Signature _____ Date _____

Please refer to relevant sections applicable to you:		Y	N
1. Wages / NZ Superannuation / Benefits	Page 1		
2. Interest and Dividends	Page 1		
3. Cashbooks	Page 1		
4. Partnerships, Trusts, Estates, LTC and Companies	Page 1		
5. Overseas Income	Page 1		
6. Cryptoassets	Page 1		
7. GST Returns	Page 2		
8. Rental Income	Page 2		
9. Donations	Page 2		
10. Working for Families Tax Credits and Parental Tax Credit	Page 3 & 4		
11. Home Office & Motor Vehicle expense claim	Schedule 1 & 2		

If you are returning the questionnaire electronically you can choose to provide the supporting documentation as either scanned files, or screenshots/snips copied and pasted to the right hand side of the relevant question. If you are using the latter option, please make sure that there is sufficient identifying information - e.g. for a bank statement we would need the date, account name & number, and the balance at 31 March clearly shown.

Please Note: If there is insufficient space on this form please add new tabs/lines if returning it electronically or add a supporting schedule or notes if returning by post.

Records Required:	✓	Comment:
1. Wages / NZ Superannuation / Benefits		
<p>Please provide us with the names of parties you have received the following from:</p> <ul style="list-style-type: none"> * Wages * ACC Payments * Government Superannuation * Any Other Benefits <p>In most cases we can access this information from the IRD website, however we do need to check all details have been included.</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
2. Interest and Dividends		
<p>Please supply the advice slips.</p> <ul style="list-style-type: none"> * For interest there will be an annual advice notice showing the withholding tax deducted. * If any dividends are taken as bonus shares include these advice slips also 	<input type="checkbox"/> <input type="checkbox"/>	
3. Cashbooks		
<p>If you are using cloud based Cashbooks we do not require any bank statements, except for the statement covering balance date (usually 31 March). If you signed up for Cloud Cashbooks during the period, we probably will require bank statements from 1 April 2024 until the date cloud based Cashbooks commenced (for some banks we can download a CSV file for the entire year).</p> <p>If you would like to know more about Xero or other Cloud solutions please contact us.</p>	<input type="checkbox"/>	
4. Partnerships, Trusts, Estates, LTC and Companies		
<p>Please supply details of income received (including financial accounts and tax returns if available).</p>	<input type="checkbox"/>	
5. Overseas Income		
<p>New Zealand residents are liable for tax on all world wide income so please provide the following:</p> <ul style="list-style-type: none"> * Include overseas interest, dividends, rental, wages received and taxation paid If applicable, please provide details of the value and quantity of the investments held at any time during the financial year. * Provide the date, value and details of any purchases, sales and income (dividends). Please attach all of your investments advisor's reports. This information is required so we can calculate if any income needs to be declared under the FIF (Foreign Investment Fund) rule * All documents relating to any sale or purchase of investments, details of amounts received or paid during the year. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
6. Cryptoassets		
<p>Have you purchased, sold or traded in Cryptoassets during the income year?</p> <ul style="list-style-type: none"> * The type of Cryptoassets * For each transaction provide the date, type of transaction - bought or sold, number of units, value in NZD * Trade reports * Bank statements showing transactions <p>There has been a significant increase in IRD audits of Cryptoassets. Please ensure you keep all records of trades and balances.</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

Only complete this section if you are eligible to receive Working For Families tax credits

Records Required:	✓	Comment:
10. Working for Families Tax Credits and Parental Tax Credit	<input type="checkbox"/>	
Please supply full names and birth dates of all children, if not previously	<input type="checkbox"/>	
If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them	<input type="checkbox"/>	
* Where a child has become financially independent during the current financial year, please advise the date they left school or home	<input type="checkbox"/>	
If you have received Working for Families Tax Credits during the year,	<input type="checkbox"/>	
* please supply the certificate issued to you by IRD, detailing the amounts.	<input type="checkbox"/>	
* Also provide details of any child support or maintenance payments made or received.	<input type="checkbox"/>	
* If we do not prepare your spouse or partner's taxation return, please provide us with details of their income if possible.	<input type="checkbox"/>	
10.1 Children's Details		
Child's name: Child's DOB:		IRD Number: Date left School:
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Child's name: Child's DOB:		IRD Number: Date left School:

Only complete this section if you are eligible to receive Working For Families tax credits

Records Required:	✓	Comment:
10.2 Additional income information - Working for Families Tax Credits		
<p>For the year starting 1 April 2017 the definition of family income for Working for Families Tax Credits has been extended. You are now required to supply details of income received from the following sources::</p>	<input type="checkbox"/>	
<p>Attributable trustee income</p> <p>Attributable trustee income is all income for the year of a trust that hasn't been distributed as beneficiary income. Trustee income will be attributed only to settlors of a trust. The settlors are individuals who establish or contribute funds to the trust.</p>	<input type="checkbox"/>	
<p>Attributable fringe benefits</p> <p>If you receive fringe benefits and you or your associates (e.g. the family trust) are shareholder-employees of the company you work for and you or your associates hold voting interests of 50% or more then you need to include the fringe benefits in your family income. The value of the fringe benefit is the tax-inclusive value of the benefit.</p>	<input type="checkbox"/>	
<p>PIE income</p> <p>This includes an amount of income attributed by a portfolio investment entity (PIE) to the principal caregiver or their spouse or partner, except if the PIE is a superannuation fund or a retirement savings scheme (e.g. KiwiSaver).</p>	<input type="checkbox"/>	
<p>Passive income of children</p> <p>This includes all passive income such as interest, rents or beneficiary income, received by a dependent child above a threshold of \$500 per year, per child.</p>	<input type="checkbox"/>	
<p>Income of non-resident spouse</p> <p>If your spouse or partner, who is not a tax resident, is earning an income overseas, from 1 April 2016 you will need to include their worldwide income as part of your family income.</p>	<input type="checkbox"/>	
<p>Tax exempt salary or wages</p> <p>This includes salary and wages that are exempt from income tax under specific international agreements in New Zealand. (e.g. employees of international organisations such as the United Nations or the Organisation for Economic Co-operation and Development (OECD)).</p>	<input type="checkbox"/>	
<p>Pensions and annuities</p> <p>This includes 50% of the amount of pension or annuity payments from life insurance policies or a superannuation fund, (excluding NZ Super).</p>	<input type="checkbox"/>	
<p>Other payments</p> <p>These are payments from any other person or entities that are used for the family's day-to-day living expenses. If the total amount is more than \$5,000 for the tax year, then the total amount must be included as family income.</p>	<input type="checkbox"/>	
<p>Income equalisation scheme deposits (excludes 'adverse events' deposits)</p> <p>This includes any deposits made by you, a company controlled by you or your trust or your trust to an agricultural, fishing or forestry business income equalisation scheme account at Inland Revenue.</p>	<input type="checkbox"/>	
<p>A detailed description and examples of above income types is available from the IRD website: http://www.ird.govt.nz/wff-tax-credits/entitlement/work-out/wfftc-entitlement-adjustments.html</p>		

Schedule 1 - Motor Vehicle Expense Claim

Vehicle		Private use %	
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Code	Expense	Add back %	Total Expense	Adjustments
	Repairs & running costs	0.00%		-
	Fuel & oil	0.00%		-
	Insurance	0.00%		-
	HP interest	0.00%		-
	Depreciation	0.00%		-
	Loss on sale	0.00%		-
	Depreciation recovered	0.00%		-

Sub - total		-	-
GST adj required?	Y	GST	-
Total private use adjustment			-

Vehicle		Private use %	
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Code	Expense	Add back %	Total Expense	Adjustments
	Repairs & running costs	0.00%		-
	Fuel & oil	0.00%		-
	Insurance	0.00%		-
	HP interest	0.00%		-
	Depreciation	0.00%		-
	Loss on sale	0.00%		-
	Depreciation recovered	0.00%		-

Sub - total		-	-
GST adj required?	Y	GST	-
Total private use adjustment			-

Schedule2 - Home Office Expense Claim

Property information

Address of property	
Area of house (m2)	
Area used for business purpose (m2)	
Percentage to claim	0.00%

Expenses with GST	% to claim	Ref	Gross amount	Amount to claim
Power & gas	0.00%			-
Insurance - building	0.00%			-
Insurance - contents	0.00%			-
Repairs & maintenance	0.00%			-
Rates	0.00%			-
Water rates	0.00%			-
Telephone rental	50.00%			-
	0.00%			-
	0.00%			-
	0.00%			-
	0.00%			-

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Expenses without GST	% of claim	Ref	Gross amount	Amount to claim
Mortgage interest	0.00%			-
Rent	0.00%			-
	0.00%			-
	0.00%			-

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