

JDW Chartered Accountants Limited
Personal / Rental Information Questionnaire
For the 2023 Year

Your trusted business partners



Client Name: _____

Date sent: _____

1 Basic Information:

Convenient time to call you is: _____

When do you want your tax returns completed by? _____

Has your employment changed in any way during the past 12 months? If yes, please provide brief details:

Please advise us of any changes in name, address, contact phone numbers or email address:

Please answer all questions on the Questionnaire and provide all information requested when you send us your accounting records. This will ensure that your returns are prepared by us as quickly as possible. If a question does not apply to your situation, mark N/A on the question.

2 Income from which Tax was deducted

Tick or Y if attached

IRD will send us your summary of earnings and schedular payments information

Please send us:

Interest and dividend certificates received during the year, NZ and overseas

(Include Portfolio summaries from investments, including Sharesies)

Royalties summaries

3 Rental Properties

Location: _____

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Number of months that the property was available to be rented: _____

If you occupy part of the property, what percentage do you occupy? _____ %

Gross Rent Received _____ \$

Other Income (e.g. Insurance claim) _____ \$

Expenses: Rates _____ \$

Water Rates _____ \$

Insurance _____ \$

Interest _____ \$

Repairs & Maintenance (list items over \$1,000) _____ \$

Advertising _____ \$

Body Corporate _____ \$

Other (provide description with amounts) _____ \$

4 Rental Property, Plant & Equipment

Attach invoices for PPE costing over \$1000 (excl GST) during the year, if not shown already

Include finance agreements, details of payment if not paid through business bank.

Review last year's depreciation schedule. Which items have been sold, traded in, scrapped?

For properties, please include legal settlement statement, sale & purchase agreements

Provide details of sales or trade ins if not shown in the business bank account.

Provide copies of valuation reports if applicable

5 Other Properties

If you sold a property within 10 years of purchase, or bought with a resale purpose,

you may have to pay tax on the profit. Please provide all details of purchase, improvements, expenses, sales if you haven't already. This includes subdivisions.

You may qualify for primary home exemption. You will need to clearly state who owned the property and who lived in it.

For properties, please include legal settlement statement, sale & purchase agreements

Provide copies of valuation reports if applicable

6 Rental Property Loans, Finance Leases and Hire Purchases

Provide a schedule of loans, leases and HPs, listing amounts due, interest rates, security and guarantees, repayment terms, covenants

7 Investments

List overseas investments bought and sold during the year

Schedule of overseas investments, showing quantity, cost and market value at year end

5 Other Income

The list below is not exhaustive, so if you are in doubt, please supply the information

Source

Income

Tax Paid

Crypto Currency Sales

\$

\$

Directors Fees

\$

\$

Estate or Trust Income

\$

\$

Income protection insurance claims

\$

\$

Overseas Pension

\$

\$

Overseas Superannuation

\$

\$

Partnership Share of Profit (Loss)

\$

\$

Self Employed Income

\$

\$

Share Options

\$

\$

Shareholder Employee Salary

\$

\$

Expenses

Income protection insurance

\$

Interest on Loans used to Purchase Investments

\$

Attributed Look Through Company (LTC) Losses

\$

Attributed Limited Partnership

\$

6 Financial Arrangements

Financial arrangement include government stocks, future contracts and deferred property settlements.

Please advise if there has been a sale or maturity of a financial arrangement.

7 Working for Families Tax Credits

If you have previously given us this information, please only advise us of changes

e.g. new children, changes in custody

	Name	IRD #	Date Birth
Spouse /		- -	
Partner	If not a client, what is your spouse/partner's taxable income?	\$	
Child 1		- -	
Child 2		- -	
Child 3		- -	
Child 4		- -	

8 Independent earner tax credit

You qualify for the number of months you are NZ Resident, no working for families, no income-tested benefits, no pension and earn between \$24,000 and \$48,000

Number of monthly you qualify

(0-12)

9 Other Information Required

ACC: If you are self-employed, what is your business description, if changed

Student loans : If you drew down or repaid a student loan let us know

Yes / No

10 Donations and School Fees

Copies of donations receipts, school fee receipts, kindergarten fee receipts (not daycare)

Declaration

I accept responsibility for all records and information supplied to you for the purpose of preparing my Income Tax Return and Financial Statements. I accept responsibility for any failure by me to supply all relevant records and information to you.

Client Name: _____

Signed _____