## Individual Tax Return Questionnaire - 2024

Please ensure this questionnaire is completed, signed, and included with your records

Client Name		Phone:				
Ciletit Name		FIIOHE.				
		E-mail:				
Balance Date	31 March 2024	E-mail.				
T. II. (. O	14					
To: Harts Chartered Accountants						
I instruct you to prepare my taxation return for the 2024 year. I undertake to supply all information necessary for you to perform this work and will be responsible for the accuracy and completeness of such information. You are authorised to communicate with my						
	finance companies and all Government agencies to obtain suc					
	ent. I also authorise you to act as my agent in dealing with all t					
Signature	Date _					
If sending this back by	v email, please type your name in above – otherwise sign it. By doing	so, you are ac	knowledging that you accept the above			
terms and conditions		, ,				
Inland Revenue n	refers to pay any refunds by direct credit. Would you pleas	se advise th	e hank account number you			
	unds deposited in to:	se auvise tri	e bank account number you			
Records and In	formation Required	✓	Comments			
	our business changed in any way during					
the past 12 months	? If yes, please provide brief details.					
1 Wages / Nation	nal Superannuation / Benefits YES / NO					
1. Wayes / Natio	nai Superannuation / Benefits 123 / NO					
Please provide us	with the names of any organisations you have received the					
following from:	, ,					
<ul><li>Wages</li></ul>						
<ul> <li>Withholding paym</li> </ul>	nents					
<ul> <li>ACC payments</li> </ul>						
National Superannuation						
·						
Any other benefits  In most cases Inlan						
In most cases Inland Revenue will have sent us these details direct however we do need to check all details have been included.						
2. New Zealand Interest and Dividends YES / NO						
Please supply the a	•					
	ved, you should have an annual advice notice showing the					
withholding tax deducted 31 March.	educted. This may be on the bottom of your bank statement					
	including those taken as benus shares					
	, including those taken as bonus shares.					
<ul><li>PIE advices or end of year summary</li><li>Power company dividends (Entrust)</li></ul>						
	y shares released by employee share schemes her & Paykel Healthcare employee share scheme.					
Please provide of						

Records and Information Required			Comments		
3. COVID-19 Support Payments					
a) Did you receive a COVID-19 support payment (CSP)  If so, how much \$	Yes □ No □				
Was this banked into your business account	Yes □ No □				
b) Did you receive any COVID-19 leave support  If so, how much \$	Yes □ No □				
Was this banked into your business account	Yes □ No □				
c) Did you receive the Small Business Cashflow Loan (SBCS)  If so, how much \$	Yes □ No □				
Was this banked into your business account	Yes □ No □				
4. Overseas Income and Investments	YES / NO				
Note: New Zealand residents are liable for tax on all worldwide in					
Please complete the separate overseas income questionnaire and include:  overseas interest, wages received, overseas pensions and taxation paid.  dividend statements of any dividends received, or shares issued in lieu of dividends.					
To comply with rules for the taxing of overseas investment including various methods of calculating your Foreign Investment Income (FIF), please provide:					
<ul> <li>A list of all your overseas investments - include the cost, currency and date of purchase of those investments including foreign superannuation and life insurance schemes.</li> </ul>					
<ul> <li>If the <u>total</u> cost of all your overseas investments <u>exceeds NZ \$</u> provide the <u>market</u> value of your investments at the beginning your income year.</li> </ul>					
There may be further information required once we have assessed what method of calculating your foreign investment income will apply.					
5. Rental Income / Mixed Use Holiday Home YES / NO					
If rent received exceeds \$4,000 please complete the separate questionnaires for each property.					
6. Did you have any income from short term rentals, i.e. Airbnb YES / NO					
If yes, please supply details					
7. Have you bought or sold any property this year? YES / NO					
If yes, please supply details					
8. Partnerships, Trusts, Estates and Companies YES / NO					
Please supply details of income received if not prepared by Harts.					

9. Any Other Income / Deductions						
<ul> <li>Attach details of any other income, i.e. royalties, share options</li> <li>Income Replacement Insurance Policy – provide details of premiums and claims.</li> <li>Look Through Company (LTC) – if you have been allocated a share of a loother than from a company that we are aware of, please provide details</li> <li>Expenses incurred against withholding payments</li> <li>Invoices for self-employed ACC premiums paid</li> <li>Were you working for more than 20 hours per week?</li> </ul>						
10. Student Loans						
I have a student loan						
11. Donations						
Do you want us to complete your rebate claim form?  YES /  If so, please attach receipts (include donations to school)	NO NO					
12. During the year the following transactions took place:						
<ul> <li>Forgiveness of debt</li> <li>Property transactions</li> <li>I received proceeds from the sale of land/buildings (other than private dwelling)</li> <li>Please attach details</li> </ul>						
13. Working For Families Tax Credits / Parental Tax Credit  If you or your partner had dependent children as at 1 April 2023 please complete the separate Working for Families Tax Credits and Parental Tax Credit questionnaire						
14. Home Office Expenses - relating to business / self-employed / shareholder employees						
Please note that this information only needs to be provided in one of your questionnaires						
If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:  Address of property:						
Power       \$						