

Records and Information Required	✓	Comments																																
4. Rental Income / Mixed Use Holiday Home YES / NO																																		
If rent received exceeds \$4,000 please complete the separate questionnaires for each property.	<input type="checkbox"/>																																	
5. Did you have any income from short term rentals, i.e. Airbnb YES / NO																																		
If yes, please supply details	<input type="checkbox"/>																																	
6. Partnerships, Trusts, Estates and Companies YES / NO																																		
Please supply details of income received if not prepared by Harts.	<input type="checkbox"/>																																	
7. Any Other Income / Deductions																																		
<ul style="list-style-type: none"> ▪ Attach details of any other income, i.e. royalties, employee share scheme, share options <input type="checkbox"/> ▪ Income Replacement Insurance Policy – provide details of premiums and claims. <input type="checkbox"/> ▪ Look Through Company (LTC) – if you have been allocated a share of a loss other than from a company that we are aware of, please provide details <input type="checkbox"/> ▪ Expenses incurred against withholding payments <input type="checkbox"/> ▪ Invoices for self-employed ACC premiums paid <input type="checkbox"/> - Were you working for more than 20 hours per week? YES / NO 																																		
8. Student Loans																																		
I have a student loan	<input type="checkbox"/>																																	
9. Donations																																		
Do you want us to complete your rebate claim form? If so, please attach receipts (include donations to school)	YES / NO																																	
10. During the year the following transactions took place:																																		
<ul style="list-style-type: none"> ▪ Forgiveness of debt <input type="checkbox"/> ▪ Property transactions <input type="checkbox"/> ▪ I received proceeds from the sale of land/buildings (other than private dwelling) <input type="checkbox"/> Please attach details																																		
11. Working For Families Tax Credits / Parental Tax Credit If you had dependent children as at 1 April 2016 please complete the separate Working for Families Tax Credits and Parental Tax Credit questionnaire																																		
12. 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: _____ <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Power</td> <td style="width: 20%;">\$ _____</td> <td style="width: 30%;"></td> <td style="width: 20%;"></td> </tr> <tr> <td>Insurance (Building & Contents)</td> <td>\$ _____</td> <td></td> <td></td> </tr> <tr> <td>Interest (House Mortgage)</td> <td>\$ _____</td> <td></td> <td></td> </tr> <tr> <td>Rates</td> <td>\$ _____</td> <td>Business Area</td> <td>_____ M2</td> </tr> <tr> <td>Repairs & Maintenance</td> <td>\$ _____</td> <td></td> <td></td> </tr> <tr> <td>Rent paid</td> <td>\$ _____</td> <td>Total Area</td> <td>_____ M2</td> </tr> <tr> <td>Other</td> <td>\$ _____</td> <td></td> <td></td> </tr> <tr> <td>Total</td> <td>\$ _____</td> <td></td> <td></td> </tr> </table>			Power	\$ _____			Insurance (Building & Contents)	\$ _____			Interest (House Mortgage)	\$ _____			Rates	\$ _____	Business Area	_____ M2	Repairs & Maintenance	\$ _____			Rent paid	\$ _____	Total Area	_____ M2	Other	\$ _____			Total	\$ _____		
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