

Individual Tax Return Questionnaire – 2018

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

Client Name		Phone:	
Balance Date	31 March 2018	Fax:	
		E-mail:	

To: Harts Chartered Accountants

I instruct you to prepare my taxation return for the 2018 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 bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to complete the above assignment. I also authorise you to act as my agent in dealing with all taxation matters with Inland Revenue.

Signature

Date _____

If sending this back by email, please type your name in above – otherwise sign it. By doing so, you are acknowledging that you accept the above terms and conditions of the engagement.

Inland Revenue prefers to pay any refunds by direct credit. Would you please advise the bank account number you would like any refunds deposited in to: Account number: _____

Records and Information Required	✓	Comments
1. Wages / National Superannuation / Benefits YES / NO		
Please provide us with the names of any organisations you have received the following from: - Wages - Withholding payments - ACC payments - National Superannuation - Any other benefits 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 advice slips. - For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March. - Dividend advices, including those taken as bonus shares. - PIE advices or end of year summary - Power company dividends (Entrust) - Have you had any shares released by employee share schemes e.g. Air NZ or Fisher & Paykel Healthcare employee share scheme. Please provide certificate/s	☐ ☐ ☐ ☐ ☐	
3. Overseas Income and Investments YES / NO		
Note: New Zealand residents are liable for tax on all worldwide income. 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 issues 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: - A list all your overseas investments- include the cost, currency and date of purchase of those investments including foreign superannuation and life insurance schemes. - If the <u>total</u> cost of all your overseas investments <u>exceeds NZ \$50,000</u> please provide the <u>market</u> value of your investments at the beginning and end of your income year. There may be further information required once we have assessed what method of calculating your foreign investment income will apply.	☐ ☐ ☐ ☐	

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.	☐	
5. Did you have any income from short term rentals, i.e. Airbnb YES / NO		
If yes, please supply details	☐	
6. Have you bought or sold any property this year? YES / NO		
If yes, please supply details	☐	
7. Partnerships, Trusts, Estates and Companies YES / NO		
Please supply details of income received if not prepared by Harts.	☐	
8. Any Other Income / Deductions		
▪ Attach details of any other income, i.e. royalties, share options ▪ Income Replacement Insurance Policy – provide details of premiums and claims. ▪ 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 ▪ Expenses incurred against withholding payments ▪ Invoices for self-employed ACC premiums paid - Were you working for more than 20 hours per week?	☐ ☐ ☐ ☐ ☐	
9. Student Loans		
I have a student loan	☐	
10. Donations		
Do you want us to complete your rebate claim form? If so, please attach receipts (include donations to school)	YES / NO	
11. During the year the following transactions took place:		
▪ Forgiveness of debt ▪ Property transactions ▪ I received proceeds from the sale of land/buildings (other than private dwelling) Please attach details	☐ ☐ ☐	
12. Working For Families Tax Credits / Parental Tax Credit If you or your partner had dependent children as at 1 April 2017 please complete the separate Working for Families Tax Credits and Parental Tax Credit questionnaire		

13. 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 \$ _____

Insurance (Building & Contents) \$ _____

Interest (House Mortgage) \$ _____

Rates \$ _____

Repairs & Maintenance \$ _____

Rent paid \$ _____

Other \$ _____

Total \$ _____

Business Area _____ M2

Total Area _____ M2